

**POSITION DUTY STATEMENT**

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION DOTP/Office of Corridor and System Planning/System Planning	
WORKING TITLE Transportation System Planner	POSITION NUMBER 900-074-4721-240	REVISION DATE 08/06/2024

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 will work on complex and high level system planning work, including the development, review, analysis, and implementation of programs, directives, guidance and performance measurement; job duties include working on statewide System Planning Program activities and products, such as the District System Management Plan (DSMP) and Corridor Plans.

**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.

- **Change Leadership:** Develops new and innovative approaches needed to improve effectiveness and efficiency of work products. Encourages others to value change. Considers impact and recommends changes. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency - Innovation, Integrity, Pride)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Lead Climate Action, Advance Equity and Livability in all Communities - Equity, Integrity, Pride)
- **Ethics and Integrity:** Demonstrated concern to be perceived as responsible, reliable, and trustworthy. Respects the confidentiality of information or concern shared by others. Honest and forthright. Conforms to accepted standards of conduct. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Lead Climate Action, Advance Equity and Livability in all Communities - Equity, 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, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, 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, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Integrity, Pride)
- **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. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, 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, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Integrity, Pride)
- **Forward Thinking:** Anticipates the implications and consequences of situations and takes appropriate actions to be prepared for possible contingencies. Anticipates and prepares for future developments. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, 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. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Innovation, Integrity, Pride)

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**TYPICAL DUTIES:**

Percentage	Essential (E)/Marginal (M) <sup>1</sup>	Job Description
25%	E	The incumbent works with Division staff and management, other Divisions, Districts, Department management, Transportation Agency, partner agencies, advocacy groups, stakeholders and the public. Develops System Planning documents, guidance and reports such as the District System Management Plan, Corridor Planning Process Guide and its Emphasis Area Guides, and other System Planning reporting tools. This involves working closely with representatives from Planning and other Headquarters Divisions, and the district, along with external partners, to assess programs, identify projects, and develop long-range strategies aligned with comprehensive corridor planning efforts. Duties may include providing guidance and developing policies, presentations, maps, correspondence, fact sheets and technical analysis. The incumbent may represent the System Planning Branch on a variety of advisory and technical groups, make presentations at seminars and technical advisory committees, and prepare written reports for a variety of audiences.
15%	E	Participates in or may lead activities that provide the basis for identifying and prioritizing transportation improvements for recommendation into local and regional plans, Caltrans System Planning documents and pre-programming project initiation activities. This includes working with teams to develop performance-based planning metric and targets, training materials, presentation materials, reports, fact sheets and other products related to system planning, project identification, nomination and prioritization.
15%	E	Serve as the System Planning Branch Coordinator and Liaison within DOTP and other Headquarters Division programs, ensuring planning documents and program activities are closely aligned. This will include communication with internal and external partners and working closely with other divisions and districts.
15%	E	Serve as the System Planning Branch Liaison to assigned Districts and Divisions, providing assistance, coordination, reporting, resource tracking and information gathering regarding all areas of the System Planning program. Work with District representatives ranging from student assistants and entry-level staff to Deputy District Directors and Public Information Officers.
10%	E	Research and prepare statewide analysis and reports on a wide range of system planning or pre-programming-related topics. Resulting products may be used to inform the system planning function or to respond to inquiries from a variety of sources. Response times may vary from same-day turnaround to long-term deadlines.
10%	E	Administer System Planning Branch requests for proposal of research or System Planning contracts. The incumbent may develop specific contract language and be responsible for working with the Division of Procurement and Contracts (DPAC) to ensure all contracts are completed within required timelines. Incumbent may manage and maintain System Planning Branch active contracts and projects utilizing contract and project management skills. Serve on technical committees. Compile committee information for provision to Caltrans staff and management, provide analysis and recommendations regarding committee work, prepare and provide briefings to management regarding committee topics.
5%	E	Maintaining files, preparing correspondence, drafting issue memos, analyzing proposed legislation, creating maps, and other written material as required. The incumbent may support various deliverables within the Office of Corridor and System Planning. The position may serve in a lead capacity for some assignments, as a team member in other assignments, or in a support role.
5%	M	Perform other job-related duties within the scope of the classification as assigned.

<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 position has no supervisory responsibilities, although occasionally the incumbent may work in a lead capacity.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

- The ability to work independently and in a team environment.

## POSITION DUTY STATEMENT

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- Knowledge of the primary Mission, Vision and Goals of the Department, as well as the Department's policies, guidelines and procedures for carrying out system planning activities;
  - Knowledge of transportation planning principles, practices, methods and processes;
  - Ability to communicate effectively in oral and written form;
  - Knowledge of federal and State laws and regulations related to transportation planning;
  - Knowledge of concepts and terminology relating to transportation planning and traffic modeling;
  - Knowledge of research, analysis methods and techniques related to planning;
  - Understanding of system and corridor planning, legislative process, project development and programming processes, and basic principles of traffic operations;
  - Role of federal, State and regional governments in providing transportation planning services;
  - Knowledge of the State/Department's contracting practices and techniques for contractor selection;
  - Ability to complete staff work in a professional, timely manner that meets quality and quantity requirements for journey-level work;
  - Ability to independently work on difficult and complex transportation planning projects;
  - Ability to effectively communicate (oral and written) with management, technical and non-technical personnel;
  - Ability to prepare and present reports and analyses using word processing, spreadsheet and presentation software;
  - Ability to gather, compile, analyze and interpret cartographic data and relate it to transportation data;
  - Ability to interpret and apply analytical techniques;
  - Awareness and sensitivity to social, economic and environmental conditions that affect transportation planning; the ability to inspire the confidence of partners; and the ability to further the recognition of the Department as a multimodal transportation organization.
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### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

System Planning is a core Planning function and serves as a primary information source in decision making and resource allocation for the State Highway System and wider transportation network. Errors, inaccurate, delayed or incomplete assignment may result in negative impact on the Department's overall Planning program, other Divisions and District processes. Failure to consider political sensitivity or fully evaluate the fiscal, economic, social and/or environmental effects of decisions on the Department's programs could result in inefficient use or loss of funding and delay in program or project delivery.

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### PUBLIC AND INTERNAL CONTACTS

Daily internal contacts with Headquarters and District units in Transportation Planning, Traffic Operations and Research, Innovation and System Information. Some contact with Metropolitan Planning Organizations/Regional Transportation Planning Agencies, outside vendors, consultants, local government, non-government organizations and the public is expected.

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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent may be required to sit for long and short periods of time using a keyboard and a mouse (fine manipulation), view a video display terminal and use a telephone. Ability to move large or cumbersome plans and project documents from one location to another. Ability to drive long distances for project related activities. Ability to travel for training purposes to various locations throughout the State of California. Must maintain an even mental balance of analytical process for multiple projects. Must be able to handle accelerated project schedules. Must maintain emotional stability under stressful and a rapid paced working environment.

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### 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 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 headquarterd location as needed to meet operational needs. Business travel may be required, and reimbursement considers an employee's designated headquarterd location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to the headquarterd location will be the responsibility of the selected candidate.

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### ADA Notice

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# POSITION DUTY STATEMENT

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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

**POSITION DUTY STATEMENT**

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION DOTP/Office of Corridor & System Planning/System Planning	
WORKING TITLE Transportation System Planner	POSITION NUMBER 900-074-4768-921	REVISION DATE 08/06/2024

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 supervision of a Senior Transportation Planner, the Transportation Planner will provide assistance in the development, review, analysis, and implementation of programs, directives, guidance and performance measurement with regards to statewide System Planning Program activities and products such as, but not limited to the District System Management Plan (DSMP); Corridor Plans.

**CORE COMPETENCIES:**

As a 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.

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**TYPICAL DUTIES:**

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30%	E	Develops System Planning documents, guidance and reports such as the District System Management Plan, Corridor Planning Process Guide and its Emphasis Area Guides, and other System planning reporting tools. This involves working closely with representatives from Planning and other Headquarters Divisions, and the district, along with external partners, to assess programs, identify projects, and develop long-range strategies aligned with comprehensive corridor planning efforts.
20%	E	Participates in or assists in activities that provide the basis for identifying and prioritizing transportation improvements for recommendation into local and regional plans, Caltrans System Planning documents and pre-programming project initiation activities. This includes working with teams to develop performance-based planning metric and targets, training materials, presentation materials, reports, fact sheets and other products related to system planning, project identification, nomination and prioritization.
15%	E	Serve as the System Planning Branch Coordinator and Liaison within DOTP and other Headquarters Division programs, ensuring planning documents and programming activities are closely aligned. This will include communication with internal and external partners and working closely with other divisions and districts.
15%	E	Serve as System Planning Branch liaison to assigned Districts and Divisions, providing assistance, coordination, reporting, resource tracking and information gathering regarding all areas of the System Planning program. Work with District representatives ranging from student assistants and entry-level staff to Deputy District Directors and Public Information Officers.
10%	E	Research and prepare statewide analysis and reports on a wide range of system planning related topics. Resulting products may be used to inform the system planning function or to respond to inquiries from a variety of sources. This task can also include assisting in managing system planning research related contracts. Response times may vary from same-day turnaround to long-term deadlines.
5%	E	Serve on technical committees. Compile committee information for provision to Caltrans staff and management, provide analysis and recommendations regarding committee work, prepare and provide briefings to management regarding committee topics. Maintaining files, preparing correspondence, drafting issue memos, analyzing proposed legislation, creating maps, and other written material as required. The incumbent may support various deliverables within the Office of Corridor and System Planning. The incumbent may represent the System Planning Branch on a variety of advisory and technical groups, make presentations at seminars and technical advisory committees, and prepare written reports for a variety of audiences. These activities may require the incumbent to develop presentations, correspondence, fact sheets and technical analysis.
5%	M	Performs other job-related duties within the scope of the classification as assigned.

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**SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS**

This position has no supervisory responsibilities.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

Knowledge of the primary Mission, Vision and Goals of the Department, as well as the Department's policies, guidelines and procedures for carrying out system planning activities;

- Knowledge of transportation planning principles, practices, methods and processes;
- Ability to communicate effectively in oral and written form;
- Knowledge of federal and State laws and regulations related to transportation planning;
- Knowledge of concepts and terminology relating to transportation planning and traffic modeling;
- Knowledge of research, analysis methods and techniques related to planning;
- Understanding of system and corridor planning, legislative process, project development and programming processes, and basic principles of traffic operations;
- Role of federal, State and regional governments in providing transportation planning services;
- Ability to complete staff work in a professional, timely manner that meets quality and quantity requirements for entry-level work;

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- Ability to effectively communicate (oral and written) with management, technical and non-technical personnel;
  - Ability to prepare and present reports and analyses using work processing, spreadsheet and presentation software;
  - Ability to gather, compile, analyze and interpret cartographic data and relate it to transportation data;
  - Ability to interpret and apply analytical techniques;
  - Awareness and sensitivity to social, economic and environmental conditions that affect transportation planning; the ability to inspire the confidence of partners; and the ability to further the recognition of the Department as a multimodal transportation organization.
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### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

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### WORK ENVIRONMENT

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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