

**POSITION DUTY STATEMENT**

PM-0924 (REV 02/2021)

CLASSIFICATION TITLE Sr Transportation Planner	OFFICE/BRANCH/SECTION Division of Local Assistance	
WORKING TITLE DBE Liaison (Specialist)	POSITION NUMBER 913-110-4724-912	EFFECTIVE DATE 11/12/2024

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

**GENERAL STATEMENT:**

As a member of the Office of Local Civil Compliance and under the general direction of the Office Chief, a Supervising Transportation Planner, the Disadvantaged Business Enterprise (DBE) Liaison serves as a high-level senior leader. The Incumbent is responsible for providing guidance, training, oversight, and enforcement of the federal Disadvantaged Business Enterprise program as required by US Department of Transportation regulations. The DBE program ensures disadvantaged businesses have opportunities to work on state transportation projects. As a DBE Liaison, the incumbent works closely with assigned districts to ensure local agencies are administering the DBE Program properly on federally funded local transportation projects. The DBE Liaison is a subject matter expert on DBE and identified key areas. The DBE Liaison collaborates and works closely with 2 other DBE Liaisons to provide a cohesive liaison team to lead DBE guidance, oversight, and training efforts to districts and Local Public Agencies (LPA), including the development of training and updating guidance. The DBE Liaison is also responsible for managing complaints made by DBE's through completion as well as other oversight and monitoring tasks. As a Senior Transportation Planner, the DBE Liaison is involved with updating and maintaining the Local Assistance Procedures Manual where related to DBE, as well as the Caltrans DBE Program Plan related to local projects. The DBE Liaison is a member of the Local Civil Compliance management team and is responsible for contributing to performance measures, performance plans, and management activities. This position requires a high-level understanding of both written and verbal communications, as the incumbent works directly with a variety of management teams at Caltrans, Caltrans Districts and with external Caltrans transportation partners. The DBE Liaison will support and promote equal opportunity in all of Caltrans programs, services and activities. The DBE Liaison may be assigned other duties commensurate with responsibilities of the classification.

**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, Strengthen Stewardship and Drive Efficiency Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, 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, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, 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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity)
- **Relationship Building:** The ability to develop and maintain internal and external trust and professional relationships, which includes listening and understanding to build rapport. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity)
- **Understanding Others/Motivation:** Understands why groups do what they do and their motivation. Is able to look from multiple perspectives in order to understand others. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity)
- **Interpersonal Effectiveness :** Effectively and appropriately interacts and communicates with others to build positive, constructive, professional relationships. Tailors communication style based on the audience. Provides and is receptive to feedback. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity)

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**POSITION DUTY STATEMENT**

PM-0924 (REV 02/2021)

- **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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity)
- **Technical Expertise:** Depth of knowledge and skill in a technical area. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity)

**TYPICAL DUTIES:**

Percentage	Job Description
Essential (E)/Marginal (M) <sup>1</sup>	
20% E	District DBE Guidance: Establish and maintain a close relationship with district staff offering support and guidance on DBE program procedures, forms, and efforts. Provide guidance to districts with DBE related questions and concerns. Provide one-on-one training to assigned districts, both virtual and in-person. Develop materials to support best practices. Update and maintain internal and external DBE websites providing guidance documents and links.
20% E	DBE Training, Guidance and Outreach: Develop and deliver training on implementation of the DBE program and its various components for both internal district staff, LPA's and other stakeholders. Develop best practices, white papers and frequently asked questions to support the DBE program, for both internal district staff and LPA's. Maintain and update internal and external websites to provide resources in support of proper DBE program implementation. Participate in delivering the DBE portions of the Federal Aid Series, Resident Engineers Academy, and the Civil Rights Academy. Collaborate and share with other DBE Liaisons in the development of training and guidance. Provide outreach to districts and LPA's on DBE program changes, updates, training and news via the Local Assistance email list and blog.
20% E	Other DBE Liaison tasks: Additional DBE program tasks include contract goal setting and good faith effort assistance, managing and resolving DBE complaints, data collection, attending and engaging in DBE meetings, actively participating on DBE committees and meetings, attending DBE Small Business Council meetings, performing annual reviews for DBE compliance report, representing DLA and other tasks related to DBE and the Office of Local Civil Compliance.
15% E	DBE Liaisons and Team Collaboration: Establish and maintain a collaborative relationship with the 2 other DBE Liaisons within the Local Civil Compliance office, as well as other members of the Local Civil Compliance office. As a DBE Liaison team, develop training materials, presentations, and procedures for the DBE program and districts. Share materials and knowledge for consistency and efficiency. Collaborate with the Local Civil Compliance data office to ensure effective and efficient data is collected.
15% E	DBE Program Policy: Ensure the successful implementation of the federal DBE Program by reviewing and studying 49 Code of Federal Regulations Part 26 and other regulations, and developing and updating procedures which guide LPA's in the proper administration of the DBE Program on local federally funded projects. As a DBE subject matter expert, continuously improve processes, procedures and content in the Local Assistance Procedures Manual. Contribute to the update of the Caltrans DBE Program plan. Work closely with the Office of Civil Rights, the Division of Construction and other stakeholders for consistency in procedures and policy. Establish oversight roles and policy.
10% M	Committees & Leadership: Provide other duties to support the Office of Local Civil Compliance, the Division of Local Assistance, and the Planning and Modal Program, including participating in organizational tasks and committees, and special assignments. Perform other duties as required to meet the Department's and Division's Goals. May act on behalf of the Office Chief in the event of their absence.

<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 incumbent does not supervise, but may provide general guidance to planners and analytical staff, and assists the Office Chief in supporting the Local Civil Rights program and project delivery.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

The incumbent must have a thorough knowledge of the organization, policies and goals, and procedures of the Department of Transportation, Must have knowledge of the purposes, organization, and policies of Federal, State, regional, and local transportation agencies and program goals and objectives of the Department of Transportation. Must have a breadth of

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knowledge including, but not limited to, transportation planning, local transportation funding programs, public relations, and management principles. The incumbent must be able to organize and facilitate meetings, make oral presentations, and write effective letters and reports. The ability to effectively administer a branch or a diverse study team is also essential. The incumbent must have the ability to create and maintain a cooperative working environment in a highly sensitive relationship where program success is oftentimes dependent upon how well local agencies deliver their transportation projects under State guidance and assistance. The incumbent performs the full range of analysis in planning and coordinating the office activities, establishing standards, developing policy and procedures, directing special studies, analyzing and recommending solutions to politically sensitive issues, handling complex administrative and personnel matters, and developing objectives and staffing recommendations required for Local Assistance functions.

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**RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR**

The incumbent is responsible for all decisions, actions, and consequences inherent in planning, organizing, directing, and controlling all Local Assistance activities. All sensitive, controversial, or highly technical decisions and/or new program and policy directions are reviewed with/by the incumbent. Errors would result in loss of Federal funding at both the State and the local level and lower credibility for the Department in dealing with Regional and other State agencies, the Legislature, FHWA, and local public agencies.

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**PUBLIC AND INTERNAL CONTACTS**

The incumbent participates in meetings and negotiations with Federal, State, Regional, and Local Agencies, and the public concerning the policy, scope, and content of the Department's Local Assistance Division. Communicate the status of current projects and programs being addressed within the Department by management, including the Director, Deputy Directors, Division Chiefs, as well as substantial contact with the various districts at the District Director and Deputy District Director levels.

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**PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS**

The incumbent must have the ability to develop and maintain cooperative working relationships; respond to difficult situations, recognize issues or problems, and acknowledge the responses without escalating tensions. Initiative is required to isolate issues and to find solutions for problems, which arise during the development of partnerships, programs and projects. Initiative is required in seeking, identifying and eliminating potential problem areas to avoid delays. The incumbent must be able to expand on the practical application of written policies, procedures and standards, and also be able to prepare issue papers, exception requests and reports recommending changes to existing procedures and standards.

The incumbent must be able to sit for prolonged periods of time while using a keyboard/mouse and video display. Must be capable of sustained mental activity for report writing, auditing, problem solving, analysis, and reasoning. Be able to handle a workload that may be subject to unexpected changes that could affect the scheduling or completion of assignments. The incumbent must have the ability to multi- task, adapt to changes, and complete tasks or projects with short notice. Must deal effectively with pressure, maintain focus and intensity, and yet remain optimistic and persistent.

The incumbent behaves in a fair and ethical manner toward others and demonstrates a sense of responsibility and commitment to public service. The incumbent values cultural diversity and other individual differences in the workforce.

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**WORK ENVIRONMENT**

The incumbent works in front of a computer system under artificial light in an office setting with long periods of working in a sitting or standing position.

This position is 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 is required 2 days a week currently but may change 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.

Some travel will be required to attend monthly, quarterly or annual meetings and/or training sessions as a participant or to provide training to the districts and local agencies.

**POSITION DUTY STATEMENT**

PM-0924 (REV 02/2021)

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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