

**POSITION DUTY STATEMENT**

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION District 8 / Division of Planning and Local Assistance	
WORKING TITLE Transportation Planner	POSITION NUMBER 908-222-4768-912	REVISION DATE

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 general direction of the District Local Assistance Engineer (DLAE), Local Assistance Branch Chief, incumbent independently plans, organizes and performs a variety of complex transportation planning projects involving the administration of federal-aid and state-aid transportation funding programs to local agencies. The incumbent will be designated as the unit's Transportation Funding Program / Project Manager for various federal and state transportation programs; Highway Bridge Program (HBP), State Transportation Improvement Program (STIP), Highway Safety Improvement Program (HSIP), Proposition 1B Seismic Retrofit Program, Active Transportation Program (ATP) and its sub programs. Incumbent will analyze and interpret federal and state statutes, policies and programs that involve federal-aid project development (including the National Environmental Policy Act (NEPA) compliance) review and compliance to State and Federal funding requirements. Incumbent will work in a team environment to deliver the Local Assistance Program and provide quality service to local agencies. Other duties may be assigned.

**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.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Safety First, Cultivate Excellence, Advance Equity and Livability in all Communities - Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety First, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity)
- **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 - 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. (Strengthen Stewardship and Drive Efficiency - Engagement, Equity)
- **Interpersonal Savvy/Partnering:** Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Cultivate Excellence - Engagement, Equity, Integrity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Strengthen Stewardship and Drive Efficiency - 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, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Integrity, Pride)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Strengthen Stewardship and Drive Efficiency - Innovation)
- **Commitment/Results Oriented:** Dedicated to public service and strives for excellence and customer satisfaction. Ensures results in their organization. (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)

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**TYPICAL DUTIES:**

Percentage	Job Description
Essential (E)/Marginal (M) <sup>1</sup>	
40% E	Assist local agencies in obtaining authorization to proceed for federal funds from Federal Highways Administration (FHWA) and allocation of state fund from California Transportation Commission (CTC). Such task includes but is not limited to review and/or comment of request for authorization and/or request for allocation for the various phases of work under project implementation such as environmental, design, right of way, utility relocation, construction engineering, and/or construction capital. Support documents to review or comment in the request for authorization with FHWA or allocation per CTC are, but not limited to, field review, data sheet, finance letter, federal or state programming of funds, and proper documentation of programmed funds in Southern California Association of Government, Regional Transportation Improvement Program. Monitor local agency project development and or disencumbering of allocation. Such activities include, but are not limited to, prompt processing of invoice expenditure guidelines, and participate in project process reviews at the request of Audits and Investigation, FHWA, and other federal agencies.
25% E	Provide support to district Local Assistance staff and other functional units on project implementation, request for authorization, request for allocation, and timely use of funds for local agency projects on the State Highway System.
15% E	Coordinate with Headquarters Division of Local Assistance in processing request for authorization and request for allocation. Coordinate with Division of Accounting in processing invoice payment and final report of expenditures. Coordinate with Audits and Investigations, FHWA, and other federal agencies in request for project process reviews.
15% E	Stay current on changes to Local Assistance with regards to the Local Assistance Procedural Manual through the Office Bulletins, Local Programs, and Procedures. stay current on changes to programming guidelines through postings on the Local Assistance website. Inform district Local Assistance staff of these changes and update. Manage local assistance databases such as LP2000, District 8 Local Assistance Database and WPS File Maker Pro, ensuring the status and the information of the projects are current and up to date.
5% M	Represent Local Assistance and participate in temporary assignments such as evaluation of project applications as needed.

<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 does not supervise other employees. Incumbent receives general direction from the Chief, Office of Local Assistance. Incumbent is expected to collaborate with Local Assistance staff with a high degree of initiative and motivation.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

Must have knowledge of the planning process and general practices of transportation planning; research methods and techniques including conducting or participating in planning studies, and contemporary transportation, environmental, land use, social, economic, fiscal, legal, and political issues; effective public participation techniques. Must have knowledge of sources of funding transportation programs and federal and state statutes relating to transportation funding. Must be familiar with the processes for federal aid project development and construction contract administration. Must have knowledge of Caltrans Project Development Manuals, Local Assistance Procedures Manual, and Guidelines. Must have ability to establish and maintain friendly and cooperative relationships with those contacted in the course of the work; communicate effectively oral and in writing.

**RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR**

Make recommendations regarding the scope of study, level of detail, method of impact analysis, impact evaluation factors, mitigation plans, and the commitment of branch resources. The incumbent is responsible for the completion and accuracy of agency submittal documents. Errors may delay project clearances thus becoming ineligible for federal and/or state funding.

**PUBLIC AND INTERNAL CONTACTS**

Communicates within the division, other district divisions, and headquarters. Has frequent contact with state, county, city and other local agencies on transportation projects. Contact is by telephone, electronic mail, written correspondence, and in person. Represents District Local Assistance at various meetings involving local governments and allied agencies.

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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

#### Physical Requirements:

- Sit and stand for short and long periods of time. Activities also include bending, stooping, pushing, pulling, lifting office and/or multi-media equipment, standing for extended periods of time, and continuous hand movement while writing or using the computer.
- Use various electronic devices such as computer, telephone, cellphone, headset, etc.
- Ability to move files and documents from one location to another.
- Facilitate and participate in multiple interactions with many people throughout the day.

#### Mental and Emotional Requirements

- Multi-task, to adapt to changes in priorities, and to complete tasks or projects on short notice.
- Adjust rapidly to new situations which warrant attention and resolution.
- Employee must sustain concentration level needed for reviewing material, problem solving, and reasoning.
- Develop and maintain cooperative relationships.
- Behave in a fair and ethical manner toward others.
- Demonstrate a sense of responsibility and commitment to public service.

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### WORK ENVIRONMENT

This position requires the majority of work to be performed in a typical office setting in a climate-controlled environment under artificial light. This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans' 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. Employees may be required to conduct business travel on behalf of the Department or commute to the assigned Headquarters location. Business travel reimbursements consider an employee's designated Headquarters location, primary residence, and may be subject to California Department of Human Resources regulations or applicable bargaining unit contract provisions. All commute expenses to the Headquarters location will be the responsibility of the employee. Work environment may also include field environments such as transportation construction zones. The incumbent may also be exposed to a variety of hazardous and/ or unpleasant field conditions including working next to high speed traffic, uneven walking surfaces, during wet, rainy, cold, or hot weather or any other type of weather conditions. Additionally, travel within the State may be required to attend various meetings, training, conferences, and/or seminars. The employee will adhere to regularly established working hours.

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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

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