

POSITION DUTY STATEMENT

DOT PM-0924 (REV 08/2024)

CLASSIFICATION TITLE Sr Transportation Planner	OFFICE/BRANCH/SECTION District 7/Regional and Multimodal System Planning	
WORKING TITLE Sustainability Program Manager	POSITION NUMBER 907-163-4724-XXX	REVISION DATE 10/17/2024

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 the Office Chief for Regional and Multimodal System Planning, the incumbent will act as the District Sustainability Manager and will manage, monitor and implement District 7's Sustainability Program to facilitate modernization for Caltrans' future. Primary tasks include: coordinating District best practices, new initiatives, performance measures, and action plans to further Caltrans' goals, strategic objectives, and strategies, as applicable to sustainability. The incumbent will represent Caltrans' sustainability program interests in meetings with internal management and external partners, lead the development of special study planning concepts and grant application packages, and act as the point of contact for District and Headquarters counterparts for Sustainability initiatives.

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.

- **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. (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)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (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)
- **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. (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)
- **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. (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)
- **Relationship Building:** The ability to develop and maintain internal and external trust and professional relationships, which includes listening and understanding to build rapport. (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)
- **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, 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)
- **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. (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)
- **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)
- **Diagnostic Information Gathering:** Identify information needed to clarify a situation, seeking that information from appropriate sources. (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)

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TYPICAL DUTIES:

Percentage	Essential (E)/Marginal (M) ¹	Job Description
45%	E	Leads the District 7 Sustainability Program - responsible for oversight, coordination and support of strategic management planning activities, projects, and studies involved in strategic planning efforts. Specifically, the incumbent will update the District's Sustainability Plan and develop the District's framework and action plan for sustainability planning in alignment with the Department's Strategic Business Plan. Serves as the District liaison for the Director's Office of Sustainability and facilitates interdisciplinary teams and occasionally is team lead to develop and analyze policy and data to prepare, administer, and monitor transportation plans, programs, and projects related to the District-level strategic plan. Participates in the formulation of district goals, policies, and long range plans relative to all functional areas. Recommends and implements policies, formulates work plans, directs and adopts district-specific measurement standards, and evaluates the effectiveness of implementation measures. Provides training, consultation, advice, and support on sustainability as required by the District Director, Chief Deputy, executive managers and District staff.
20%	E	Develops State Planning and Research (SPR) concepts and applications in consultation with Headquarters and District subject matter experts and in alignment with Department and District priorities. Coordinates with the Divisions of Procurement and Contracts and Transportation Planning to develop scopes of work for requests for proposals (RFPs), evaluate proposals, and complete other relevant procurement and contract management activities. Tracks grant/contract deliverables and schedules, maintains a calendar of important deadlines and ensures project leads are aware of schedules, deadlines, and funding agreement terms. Coordinates receipt of awards and contract documentation, maintains proposal and funding records in database systems. Guides and facilitates cross-functional staff in the development and preparation of research proposals, contracts, sub-contracts, and agreements. Ensures programming and invoicing deadlines are met to avoid penalties.
20%	E	Collaborates and coordinates with the Director's Office of Sustainability, internal Divisions (Maintenance, Traffic Operations, Environmental, etc.), and all planning functions (such as travel forecasting and analysis, freight, system planning, transit, climate change, complete streets, and regional planning) to organize and assist in the delivery of sustainability-related items. Recommends how best to integrate sustainability planning in district-wide plans, long-range transportation plans, regional plans, modal programs, and corridor studies that develop investment priorities for meeting sustainable transportation goals. Reviews and comments on Planning and Project Delivery documents to further the District's sustainability goals.
10%	E	Monitors and reviews new legislation, planning policy, and various partner agency board and committee staff reports. Develops recommendations and assessment of potential actions and synthesizes these activities into memorandums that will be shared with the Office Chief and Executive-level staff. Researches topics, coordinates quality briefing packets, and advises the Office Chief and Deputy District Director.
5%	M	Assists in the implementation of other office responsibilities, including attending meetings, developing agendas, facilitating work sessions, writing reports, summarizing activities, and developing action plans. Represents the Office Chief as required. Manages the applications of sustainability principles by making efficient, risk-based, balanced decisions through the use of best practices; builds relationships and formulates policies with external partners and industry to achieve preservation and prosperity.

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

The position does not supervise. However, the incumbent for this position will lead the Sustainability Program and in that capacity, may direct the work of others. The incumbent may be asked to serve in a supervisory capacity in the absence of a manager as needed.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of: Caltrans' mission, organization, policies, and procedures, federal and State laws and regulations, concepts and terminology relating to transportation planning, sources of funding transportation programs, 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 know the laws, rules, and policies of the State of California regarding transportation issues and

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sustainability. Must be able to incorporate Department input with up-to-date research to guide teams in the development of useful, performance-driven objectives, strategies and measurements to ensure the successful implementation of sustainability and innovation.

Ability to: Direct evaluation of transportation and land-use plans to identify degree of consistency with State transportation and environmental priorities. Conduct studies related to State transportation planning, analyze problems and develop appropriate solutions, recommend effective courses of action, persuasively negotiate agreements with various internal and external stakeholders/partners, and evaluate general planning proposals. Gather, compile, analyze, and interpret data, reason basically and creatively develop formats to present and display data, work effectively with others as an interdisciplinary team member, build strong partnerships to carry out new programs and/or recommendations, and ensure understanding of goals and objectives across functions. Incumbent must propose, perform and evaluate transportation planning research; participate in policy development and implementation; and analyze proposed policies from other government agencies.

The incumbent must be able to analyze the impacts of projects and policies to the transportation system with adequate consideration to a multitude of administrative, legal, political, and institutional factors. Awareness and sensitivity to social, economic, and environmental conditions, which affect transportation planning, the ability to inspire the confidence of others and the ability to further the recognition of Caltrans as a multimodal transportation organization is necessary.

In addition, incumbent must possess a high degree of leadership skills. Incumbent needs a unique knowledge of communication theory and ability to convey accurately the Department's strategic management plan and performance measures to a broad audience. Incumbent must work with the executive managers, as multi-disciplinary staff, and partners internally and externally with expert communication.

Must be able to communicate both orally and in writing to be an effective advocate for and implementor of the Department's Strategic Plan Goals and Objectives. Ability to translate technical information into well-written and concise reports. Must present ideas effectively orally and in writing; work effectively with others as an interdisciplinary team member; establish and maintain effective and cooperative working relationships with those contacted during the course of the work; evaluate and monitor the work of consultants; communicate effectively with other agencies, the public, and the media; and organize and direct the work of a project teams engaged in a variety of strategic planning activities.

Must be able to inspire and motivate Department staff and teams in the criticality of sustainability and innovation for Department success. Must be able to perform effectively under rigid time constraints. Must have the ability to plan, organize and direct the work of multi-disciplinary professional and administrative staff; analyze administrative policies, organizational procedures and practices; integrate the activities of a diverse program to attain common goals; gain the confidence and support of top-level administrators and advise them on a wide range of administrative matters; develop cooperative working relationships with representatives of all levels of government, the public, and the Legislative and Executive Branches; analyze complex problems and recommend effective courses of action; prepare and review reports; and effectively contribute to Caltrans' EEO objectives.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Implementation of the Department's Sustainability Program affects all statewide Department programs. Providing effective management in the implementation of the program is critical to the Department in meeting its goals. Consequences of errors can be serious and far-reaching, negatively affecting the Department, its Sustainability Program, and its partnership with regional transportation planning agencies, other state agencies, federal and local partners. The incumbent is responsible for carrying out actions on politically sensitive areas such as policy, guidance, performance measurement, and public outreach regarding the implementation of the Sustainability Program. Errors can damage or limit the programs' implementation.

PUBLIC AND INTERNAL CONTACTS

Independently, and in consultation with the Office Chief of Transportation Planning, confers with staff in the District and outside agencies, developers, consultants, and the general public during daily operations. The individual is responsible for representing the District in all phases of transportation planning and administrative activities under the incumbents' control and providing support where necessary. The Senior Transportation Planner must effectively represent the District to local, regional, state and federal agencies, Headquarters functional managers, and other private and public sector agencies. The incumbent acts as a resource person for the Office Chief of Transportation Planning. Contacts at lower levels usually address a specific problem, e.g. information to be provided or requested. The subject matter varies from the simple to the complex, and may be controversial. Some times official commitments are made. Contacts are daily.

The incumbent must consult with and advise other employees at all levels on transportation issues, liaise with various District and Headquarters staff involving a wide range of complex and politically sensitive issues. Must be able to handle all difficult queries from the public and project competence and integrity in these dealings.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent may be required to sit for periods of time using a keyboard and video display terminal. The incumbent should be able to quickly adapt behavior and work methods in response to new information, priorities, and unexpected obstacles; multi-task,

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effectively interact with many levels of people in a cooperative manner; be decisive; take appropriate actions; and complete tasks or projects with short notice. The incumbent should be able to deal effectively with pressure; adapt to changes in priorities; maintain focus and intensity yet remain optimistic and persistent, under adversity; develop and maintain cooperative relationships and the ability to focus for long periods of time.

Must be considerate and respond appropriately to the needs, feelings and capabilities of different people in different situations; act in a fair and ethical manner toward others; demonstrate a sense of responsibility and commitment to public service; develop new insights into situations and apply innovative solutions; create a work environment that encourages creative thinking and innovation; value cultural diversity and other individual differences in the workforce.

WORK ENVIRONMENT

The incumbent works in front of a computer system under artificial light in a climate-controlled office setting with long periods of working in a sitting or standing position. May also be required to travel and attend meetings outside the district office. 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. 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.

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. 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.

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

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