

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Sr Transportation Planner	OFFICE/BRANCH/SECTION Financial Programming/OCIP	
WORKING TITLE Freight Program Liaison	POSITION NUMBER 900-080-4724-011	REVISION DATE 10/30/2024

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 general supervision of the Chief, Office of Capital Improvement Programming, a Supervising Transportation Engineer, the Senior Transportation Planner performs complex planning work related to the identification, analysis, administration, reporting, coordination and implementation of the following freight related Senate Bill 1 (SB 1) and Proposition 1B programs. The incumbent serves as lead in reviewing the Project Initiation Documents (PID) for various programs and in delivering all aspects of the Division's responsibilities for the state's SB 1 – Trade Corridor Enhancement Program (TCEP) projects in certain districts, which includes the federal freight related funds and Trade Corridors Improvement Fund (TCIF) Program. The incumbent coordinates with staff within Financial Programming, other Department Divisions and Programs, Districts, the Department's Management team, the California Transportation Commission (CTC), the California State Transportation Agency (CalSTA), local and regional agency project sponsors and stakeholders, and private transportation organizations such as railroads and seaports in delivery of these freight programs.

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.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Cultivate Excellence - Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation)
- **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. (Cultivate Excellence - 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. (Strengthen Stewardship and Drive Efficiency - Integrity)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence - Engagement, 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 - Engagement, Innovation)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Strengthen Stewardship and Drive Efficiency - Innovation, Integrity)
- **Business Acumen:** Ability to perform essential functions of position with insight, acuteness, and intelligence in the applicable areas of commerce and/or industry. (Cultivate Excellence - Engagement, Innovation)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	

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50%	E	<p>The incumbent serves as lead in reviewing the Project Initiation Documents (PID) for various programs such as State Transportation Improvement Program (STIP), TCEP, and Solutions for Congested Corridors Program (SCCP). The incumbent is responsible for reviewing the TCEP and SCCP applications and leading the Division's involvement in the implementation of the freight projects identified in the TCEP, and TCIF Programs. This lead role includes but is not limited to coordinating, and as needed, reviewing the Department's TCEP applications, reviewing Baseline Agreements (BA), preparing the CTC Book Items, facilitating project problem resolution, participation in the updating of TCEP, and TCIF program guidelines and procedures, project evaluation and performance measures, amending project agreements, meeting CTC deadlines, and providing verbal and written reports to Department and Agency Management. The incumbent is the primary liaison to Division of Transportation Planning for the development of Interregional Transportation Strategic Plan.</p> <p>The incumbent coordinates project management activities with Capital Outlay, Local Assistance, and Rail Division Coordinators for individual TCEP, and TCIF projects. The incumbent is responsible for working with the TCEP and TCIF Program contacts in various divisions, to ensure project action requests (e.g. Amendments, Corrective Action Plans and Allocation Requests) are handled in a timely manner, and comply with the SB 1 and Proposition 1B Bond accountability requirements.</p> <p>The incumbent collaborates with Programming, the Proposition 1B Bond Accountability Team, the SB 1 Accountability team, and the CTC Liaison in project tracking, auditing, and report generation including quarterly reports for the CTC.</p>
20%	E	<p>The incumbent is responsible for leading the Division's involvement with the project status reporting for TCEP and TCIF. This lead role includes but is not limited to coordinating with TCEP program contacts in various divisions, reviewing project reports, preparing program level reports, monitoring project performance measures, reviewing corrective actions, evaluating the need for project amendments, and providing verbal and written reports to Department and Agency Management.</p>
15%	E	<p>Developing and maintaining current records within the programming database and personal knowledge of project and program information for all projects in assigned areas. This requires regular information exchange with other members of the office, Program Advisors from other programs, HQ and district Project Management and Planning staff, regional agency representatives, local project sponsors and California Transportation Commission staff.</p>
10%	E	<p>Conducting special studies. Preparing or directing the preparation of charts, diagrams, maps, fact sheets, correspondence, research, and reports as necessary and as directed. Review and make recommendations on legislative proposals; prepare correspondence including referrals from the Legislature, the Governor and the Director.</p>
5%	M	<p>Reviewing and providing input to the TCEP guidelines. Maintaining the desk manual for the TCEP coordination activities.</p>

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 Senior Transportation Planner receives general instruction and guidance from the Office Chief. The Senior Transportation Planner does not supervise but may act as lead worker for associate and assistant staff in the office.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

A thorough knowledge of state statutes, regulations, guidelines and policies related to transportation programming, particularly those affecting freight transport and economic development. A general knowledge of federal statutes, regulations, guidelines and policies related to transportation programming, project delivery and funding of transportation projects. An understanding of the state freight plans and the relationship of the federal transportation programming process to the state's transportation programming process.

Demonstrate the ability to lead and work with a multi-disciplinary staff, collaborate with outside stakeholders, and serve in a consulting and coordinating capacity with other Caltrans' Districts, HQ Divisions, and the California Transportation Commission,

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in developing quarterly and annual program reports.

Broad and comprehensive knowledge of Transportation Programming, Transportation Planning, and Project Implementation.

Knowledge of the Caltrans' project delivery process and project management theories. Knowledge of state and federal statutes as they relate to Transportation Planning, Programming and project funding. Demonstrate the ability to perform complex calculations, use spread sheets and conduct research of state and federal statutes and population data.

Demonstrate the ability to analyze difficult and complex project delivery issues, and to prepare presentations and/or write reports to various levels of management, Caltrans' staff and outside Agencies.

Demonstrate the ability to respond to inquiries from Caltrans' management, and internal and external customers in a timely and effective manner.

Balancing multiple priorities and meeting strict deadlines. Ability to work with minimum direction and supervision, to initiate action independently, to handle multiple assignments simultaneously, to learn new tasks quickly, and to be responsive to customers and management policy.

Knowledge of and the ability to use a personal computer equipped with e-mail, word processing, spreadsheet, and database software, including Microsoft Word, Microsoft Excel, Access database, and internet applications. Knowledge of database development and management.

Ability to communicate effectively both in writing and orally. The ability to develop and maintain effective working relationships and work cooperatively with others.

Ability to work with minimum direction and supervision, to initiate action independently, to handle multiple assignments simultaneously, to learn new tasks quickly with little or no formal training, and to be responsive to customers and management policy.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Decisions made by this position could impact Caltrans' policies, programs and projects; programs and projects of the California Transportation Commission; and projects of public and private stakeholders/partners. Failure to consider the political sensitivity or to fully evaluate the fiscal, economic, social and environmental impacts or technological constraints on Caltrans' programs, could result in delays in program delivery and subsequent losses of funding. Failure to adequately direct or complete analyses according to project scope and schedule could result in project or program delays and decreased credibility with the Legislature, the goods movement industry, and/or other agencies or customers and a loss or reduction of funding to Caltrans' project sponsors and private stakeholders.

PUBLIC AND INTERNAL CONTACTS

The incumbent will routinely contact various Caltrans' Headquarters and District staff, and CTC staff. The incumbent may also contact staff at sponsoring agencies and various others in state service. Incumbent must be able to - with a combination of knowledge, tact, and authority - communicate with and build positive working relationships with public and private sector parties. Failure to communicate effectively and work in a timely manner with internal and external contacts, could result in lost opportunities to improve system performance, secure funds for transportation programs and projects, or advance transportation plans and analyses.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to sit for long periods of time using a keyboard and video display terminal.

WORK ENVIRONMENT

Employee will work in a climate-controlled office under artificial lighting and must be able to travel to meetings.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans' evolving telework policy. Caltrans supports telework, recognizing that in-person attendance may be required based on

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operational needs. Employees are expected to be able to report to their worksites with minimum notification if an urgent need arises. Employees are required to report to the office a minimum of two days a week.

The selected candidate will be required to commute to the headquartered location as needed to meet operational needs. All commute expenses to the headquartered location will be the responsibility of the selected candidate.

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.

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.)

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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