

POSITION DUTY STATEMENT

DOT PM-0924 (REV 08/2024)

CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION D5 Planning and Local Assistance	
WORKING TITLE Local Assistance Planner	POSITION NUMBER 905-800-4768-912	REVISION DATE 12/09/2024

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 Engineer serving as the District Local Assistance Engineer (DLAE), incumbent will be responsible for completing a variety of complex technical and analytical transportation planning activities in support of the District's Local Assistance Program. This position requires a significant amount of day-to-day coordination and communication both internally with staff within the unit, as well as externally with our local agency partners, and is subject to many time sensitive deadlines. It is essential that the incumbent can thrive in a team-oriented environment working in partnership with the other staff members in the unit.

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. (Cultivate Excellence - Engagement)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Cultivate Excellence - Integrity)
- **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. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **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 - 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 - Engagement)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence - Integrity)
- **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 - Engagement)
- **Planning and Results Oriented:** Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (Cultivate Excellence - Integrity)
- **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. (Cultivate Excellence - Integrity)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	
25% E	Under the guidance and review of the DLAE assist in managing the following transportation funding programs: Regional Surface Transportation Program (RSTP) Exchange Program, Planning Programming and Monitoring (PPM) Funds, Safe Streets for All (SS4A) Planning Grants, Active Transportation Program (ATP) Non-Infrastructure (NI) and the remainder of the Clean California Local Grant Program and the Clean California District Transit Partnership Program. Other programs may be added as they are developed. Accurately interpret federal and state guidelines to develop program policies, procedures and documents. Assist in providing guidance and technical support to local agencies applying for grant programs.

ADA Notice

This document is available in alternative accessible formats. For more information, please contact the Forms Management Unit at (279) 234-2284, TTY 711, in writing at Forms Management Unit, 1120 N Street, MS-89, Sacramento, CA 95814, or by email at Forms.Management.Unit@dot.ca.gov.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 08/2024)

25%	E	Assist in monitoring and tracking the regional transportation planning process for conformance with State and Federal requirements; coordinate with applicable District staff to provide Transportation Planning information to Federal, State, regional, local agencies, and transit operators to assist in carrying out the transportation planning process. Attend Quarterly Project Delivery Status Meetings with Division of Local Assistance (DLA) and FHWA to ensure local agency projects remain off the Inactive List and coordinate project status and invoicing with local agencies as needed.
25%	E	Assist in submitting Allocations in VIPER for RSTP, PPM and ATP-NI for Regional Transportation Planning Agencies (RTPA), cities and counties. Ensure funds are programmed, allocated, obligated, encumbered and expended according to the Local Assistance Program and Procedures Manuals. Process progress and final invoices.
20%	E	Assist the Senior Transportation Engineer with monitoring and ensuring compliance with Disadvantaged Business Enterprise (DBE) Reporting for consultant and construction contracts. This includes the Consultant Proposal DBE Commitment, Construction Contract DBE Commitment, Final Report of DBE Utilization, Bidder's List data, reporting in LP2000 and other databases as required. Serve as Local Assistance Title VI Coordinator and submit quarterly reporting.
5%	M	Perform various analyses and special projects as assigned by the DLAE.

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

This position does not supervise, delegate work, or act in a lead capacity over other employees.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

State and Federal laws and regulations related to transportation planning. Knowledge of Caltrans policies, plans, guidance, and practices related to the Division of Local Assistance. The planning process and general practices of transportation planning. Research methods and techniques including conducting or participating in planning studies, contemporary transportation, environmental, land use, social, economic, fiscal, legal and political issues. Knowledge of and ability to use Microsoft Office Suite (Word, Excel, Planner, Powerpoint, etc.), Adobe Acrobat, Smartsheet, as well as other programs and databases commonly used in transportation planning.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent has a responsibility to help ensure the principles and practices of transportation planning are carried out and implemented in accordance with the Federal and State laws. Errors could result in loss of credibility with federal, state, local agencies, stakeholders, advocacy group, tribal governments, and the public with which the Department interacts. Failure could result in delays and increased costs to the Department and to state and local partners.

PUBLIC AND INTERNAL CONTACTS

The incumbent interacts regularly with other staff within District 5 and throughout the Department, and with representatives of local, regional, state and federal agencies, stakeholders, advocacy groups, tribal governments, the general public.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical requirements are those usual to an office: use of office equipment (e.g., computers, phone, fax, etc.), accessing information in files and folders, interacting with co-workers and other customers and suppliers. Some travel, which may involve overnight stays, is required.

WORK ENVIRONMENT

The incumbent works in a typical florescent-lighted, climate-controlled, office environment in an older multi-story state office building. The incumbent must operate usual office equipment. On occasion, the incumbent will need to travel to other locations to attend meetings, make presentations, etc., in different offices, conference and convention facilities, and the like. If overnight stays were involved, these would generally be in hotel/motels or accommodations in Department facilities (e.g., lodging at Maintenance Stations). Travel would generally be via plane, train, car, public transit, bicycle, ferry or foot.

This position may be 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 may be required based on operational needs.

ADA Notice

This document is available in alternative accessible formats. For more information, please contact the Forms Management Unit at (279) 234-2284, TTY 711, in writing at Forms Management Unit, 1120 N Street, MS-89, Sacramento, CA 95814, or by email at Forms.Management.Unit@dot.ca.gov.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 08/2024)

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

ADA Notice

This document is available in alternative accessible formats. For more information, please contact the Forms Management Unit at (279) 234-2284, TTY 711, in writing at Forms Management Unit, 1120 N Street, MS-89, Sacramento, CA 95814, or by email at Forms.Management.Unit@dot.ca.gov.