

POSITION DUTY STATEMENT

DOT PM-0924 (REV 08/2024)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION Low Carbon Transit Operations Program
WORKING TITLE Associate Transportation Planner	POSITION NUMBER 900-064-4721-919
	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:

The Division of Local Assistance (DLA), Low Carbon Transit Operations Program (LCTOP) is responsible for one of Department of Transportation (Caltrans) administered California Climate Investment Programs. Under the direction of the Senior Transportation Planner (Program Manager LCTOP), the Associate Transportation Planner performs the more complex tasks involved in analyzing, developing, administering, and monitoring State policy, coordinates and works with local transit operators, California State Transportation Agency (CalSTA), California Air Resources Board (CARB), and State Controller's Office (SCO) to: develop evaluate, administer, and monitor transit projects under LCTOP. Tasks related to other transit policy duties and providing technical assistance will also be required.

CORE COMPETENCIES:

As an Associate 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. (Lead Climate Action - Equity, Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Advance Equity and Livability in all Communities - Innovation)
- **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 - Engagement, Pride)
- **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 - Engagement)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence - Engagement, Equity)
- **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, Strengthen Stewardship and Drive Efficiency - Engagement, Pride)
- **Conceptual Thinking:** Ability to find effective solutions to issues by taking the appropriate perspective (i.e., holistic, abstract, or theoretical). (Strengthen Stewardship and Drive Efficiency - Engagement)
- **Technical Expertise:** Depth of knowledge and skill in a technical area. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Integrity)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	
35% E	Communicate and coordinate with eligible regional transportation planning agencies and transit operators, providing support with the preparation and submittal of LCTOP documents including Allocation Requests, Project Activity Reports, Corrective Action Plans, Close-Out Reports, Outcome Reporting and Jobs Reporting. Review LCTOP documents for compliance as it relates to project scope, cost, estimated greenhouse gas emission reduction, co-benefits, and Priority Population Benefits requirements. Develop a working relationship with regional transportation planning agencies, transit operators, CalSTA, SCO, SGC, and CARB providing technical assistance on LCTOP.

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35%	E	TTrack and monitor existing funded LCTOP projects ensuring consistency of project data, purpose, and funding. Review and approve proposed LCTOP project change requests. Develop and maintain project records and files, including maintenance of date in coordination with CARB requirements (California Climate Investment Reporting and Tracking System). Under the guidance of Senior Transportation Planner, review records to ensure funded project activities are timely, within the approved scope, cost, reduction of greenhouse gas emissions, and are achieving the intended benefits.
20%	E	Develops, administers, and monitors LCTOP changes to ensure compliance with new regulations. Tasks include implementing new processes and updating the LCTOP guidelines and branch desk procedures. Review and revise the LCTOP Guidelines and other relevant program documents annually (Allocation Request Form, Reporting Forms, etc). Update LCTOP website as needed. Create/Update project maps as needed (ARC GIS)
5%	M	Provides program information to Department, CalSTA, CA Legislatures and CARB staff as requested. Provide information to Caltrans district transit representatives and respond to requests for information or technical assistance
5%	M	Provides program information to other Department staff as requested. Responds to information requests, and conducts other related work as requested. Travel Throughout the State and conduct program workshops and project site inspections.

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

None

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

This position requires an intermediate-level knowledge of the transportation planning process, state climate goals, and legislation, the ability to write effectively, to gather, compile, analyze, and interpret data. Be able to analyze problems accurately and recommend effective courses of action. The ability to develop formats to present a display data, to consult with other Caltrans divisions and outside agencies. To present ideas orally and to work effectively with others, as team member is also required. Networking, and gathering, compiling, and manipulating data using a computer and various software including but not limited to: Word, Excel, Office, Adobe PDF, ARC GIS.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Consequences of error can be serious and far-reaching, effecting the Department but also regional transportation planning agencies, transit operators and transit service providers. The incumbent is frequently responsible for making recommendation on politically sensitive areas such as unmet transit needs findings, on new administrative regulations and resolutions of disputes brought about in the implementation of the program.

PUBLIC AND INTERNAL CONTACTS

Have a wide variety of regular contacts with persons outside of the Division of Rail Mass Transportation Program, by telephone, in writing and in person. Frequent contact with district transit representatives, local transit operators, CTC staff, CalSTA staff, CARB staff and other department staff members, regarding the planning, programming, funding, agreement execution, and monitoring of State-funded rail and transit projects and related transit policy.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent should have the ability to work on a keyboard; manual dexterity; sitting for long periods; develop and maintain cooperative relationships; ability to focus for long periods of time. Must be able to sit and/or stand for long duration and perform tasks utilizing a PC. Incumbent may be required to occasionally bend, stoop, and kneel. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. Employees must be able to concentrate in order to review and create documents and meet strict deadlines at times. Is open to change and new information; adapts behavior and work methods in response to new information, changing conditions or unexpected obstacles.

WORK ENVIRONMENT

This position may be eligible for telework. The amount of telework is at the 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

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the headquartered location will be the responsibility of the selected candidate. Employee may be required to travel. May need to extend day to complete vital projects.

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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DOT PM-0924 (REV 08/2024)

CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION Low Carbon Transit Operations Program	
WORKING TITLE Transportation Planner	POSITION NUMBER 900-064-4768-919	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:

The Division of Rail and Mass Transportation (DRMT), Low Carbon Transit Operations Program (LCTOP) is responsible for one of Department of Transportation (Caltrans) administered California Climate Investment Programs. Under the supervision of the Senior Transportation Planner in the DRMT, LCTOP, the Transportation Planner performs less complex entry-level tasks involved in analyzing, developing, administering, and monitoring State policy, and assists with local transit operators, California State Transportation Agency (CalSTA), California Air Resources Board (CARB), and State Controller's Office (SCO) to: assist in the development, evaluation, administration and monitoring of transit projects under the LCTOP. Tasks related to other transit policy duties and providing technical assistance will also be required.

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.

- **Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement)
- **Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **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, Advance Equity and Livability in all Communities - 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, Integrity)
- **Fostering Diversity**: Capable of working with a diverse work group, including but not limited to differences in race, nationality, culture, age, gender, and differently able. Makes everyone feel valuable regardless of diversity in personality, culture, or background. Fosters a diverse culture to create best solutions. (Advance Equity and Livability in all Communities - Equity, Innovation)
- **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. (Strengthen Stewardship and Drive Efficiency - Engagement, Innovation)
- **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, Strengthen Stewardship and Drive Efficiency - Engagement, Integrity)
- **Analytical Skills**: Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **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 - Engagement, Pride)

TYPICAL DUTIES:

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

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45%	E	Under the guidance of the Branch Chief and Associate Transportation Planners, coordinates between DRMT and eligible transit recipients/agencies. Provides support to those agencies in the preparation of proposed LCTOP allocation requests, including detailed review to ensure program compliance as it related to project scope, costs, estimated greenhouse gas emissions reduction, co-benefits and priority-populations benefit requirements. Tasks include the review of LCTOP allocation requests, project progress reports, corrective action plans, final project reports and outcome reporting. Liaison will work with the Branch Chief to finalize and approve reports and requests.
30%	E	Under the guidance of the Branch Chief and Associate Transportation Planners, will track and monitor all existing LCTOP projects approved and funds appropriated to the assigned region. All tracking and monitoring will need to be confirmed by either an Associate Transportation Planner or Branch Chief prior to approval. The Transportation Planner will be assisted by the Associate Transportation Planner for review and draft approval for proposed LCTOP project change requests. Ensuring consistency of project data and develop and maintain project records and files, including maintenance of data in coordination with CARD California Climate Investments Reporting and Tracking System with strong usage in Excel.
20%	E	Under the guidance of the Branch Chief and Associate Transportation Planners, reviews reports to ensure funded project activities are timely, within the approved score and cost, reduction of greenhouse gas emissions and are achieving the intended purpose for which they are utilized.
5%	M	Assists with the development, administration and monitoring of LCTOP changes to ensure compliance with new regulations. Less complex tasks including but not limited to: the review and revision of the LCTOP Guidelines and other relevant program documents annually (Allocation Request Form, Reporting Forms, etc.) under the guidance of the Branch Chief or Associate Transportation Planners. Updated LCTOP website as needed, create and update project maps as needed (ARC GIS).

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SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

None

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

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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.)

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