

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION Office of Transit Grants & Contracts (FTA Grants Mgmt)	
WORKING TITLE Transportation Planner	POSITION NUMBER 900-064-4768-919	REVISION DATE 12/19/2024

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 supervision of the Branch Chief, Grants Management, the Transportation Planner is an entry-level position responsible for providing transportation planning support and technical assistance to the Federal Transit Administration (FTA) grant programs administered within the Office of Federal Transit Programs (Federal Office) of the Division of Local Assistance (DLA). The incumbent performs transit grant activities as required by the FTA, including providing technical assistance regarding grant administration to program managers and staff within the Federal Office, monitoring grant activities and balances, maintaining accurate financial information in various data systems, preparing management reports and assisting in ensuring compliance with FTA grant requirements. This position may require travel.

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.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (Strengthen Stewardship and Drive Efficiency - Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Strengthen Stewardship and Drive Efficiency - 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. (Strengthen Stewardship and Drive Efficiency - Equity, 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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, 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. (Strengthen Stewardship and Drive Efficiency - 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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement)
- **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, Strengthen Stewardship and Drive Efficiency - Engagement, Integrity)

TYPICAL DUTIES:

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

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45%	E	Assist in administering transit grants funded through the Elderly and Disabled Specialized Transit (5310), Rural Transit (5311), Intercity Bus (5311(f)), and the Bus and Bus Facilities (5339) Programs, ensuring projects comply with FTA regulations. Responsible for approving expenditures and requests for reimbursement and monitoring available funding, including FTA's electronic grant management system (TrAMS), Caltrans' accounting system (Advantage), and DLA's electronic grant management system (BlackCat Transit) input. Monitor activities on all active grants including preparation of amendments and budget revisions needed. Assist in preparing project budgets and milestone schedules for inclusion in Caltrans' annual grant applications to FTA, using FTA's electronic grant management system. Help manage multiple projects in coordination with FTA, Caltrans Accounting, and co-workers.
25%	E	Under the guidance and review of the Branch Chief and Associate Transportation Planners, review and interpret federal and state guidelines which contribute to the development of transportation program policies, procedures, and documents. Assist in providing guidance and technical support to Districts, planning agencies and transit operators regarding program requirements. Under supervision, use knowledge of state and federal accounting practices, local planning processes, project management techniques, and negotiating skills in working with stakeholders and meeting project schedules. Coordinate with staff within the program and in other programs to assist in DLA consistency.
15%	E	Assist in evaluating and monitoring transportation programs to ensure conformity with FTA requirements and coordination with local planning processes. Prepare reports and documents in response to audits and other program related reviews.
5%	E	Maintain knowledge of current priorities and programs, trends, and technical aspects for the FTA grant programs in the of Office including Drug and Alcohol laws, Safety Management Systems regulations and policies. Assist in updating and maintaining the Statewide FTA Grant Compliance Plan.
5%	E	Respond to inquiries from external partners and stakeholders, members of the public, and internal employees. Under supervision, learn to recognize issues which are politically sensitive and the potential ramifications on Caltrans, our stakeholders, and customers.
5%	M	Perform other duties within the scope of the classification as assigned.

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 incumbent does not supervise.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent must have the ability to apply administrative planning expertise to work. This position requires knowledge of human services transportation, FTA Grant Administrative requirements, and transportation emergency planning and procedures. This involves data collection, research, and reporting related to federal transit grants. The position requires analysis, evaluation, and development of alternative analysis. The incumbent must have the ability to apply analytical techniques to resolve or recommend solutions to transportation problems.

The incumbent must be able to communicate effectively, both in writing and orally, and have the ability to develop and maintain effective working relationships, as well as work cooperatively with others. Knowledge of Federal and State laws related to transportation planning including Homeland regulations and procedures, programming, and funding of transit projects is vital. In addition, the ability to work with moderate direction and supervision, to initiate action independent, or as an interdisciplinary team member, to handle multiple assignments simultaneously is desirable.

The ability to perceive political and policy implications of actions that the Department is considering is desired. Knowledge of computer processing techniques and applications, research methods and analytical techniques, including conducting or participating in planning studies, contemporary transportation, environmental, land use, social, economic, fiscal, legal, and political issues, and effective public participation techniques is also desirable.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for implementation of assigned tasks based on guidelines furnished by his/her supervisor or designated lead person. Work must be completed with specific recommendations. Consequences of an error in judgment could result in loss of credibility with Caltrans partners and can be serious and far-reaching, affecting not only the Department but also regional transportation planning agencies, transit operators and transit service providers. Prepare reports and documents in

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response to audits and other program related reviews; the consequence of not meeting reporting requirements could potentially result in the loss of federal funds.

PUBLIC AND INTERNAL CONTACTS

The incumbent participates in various meetings dealing with federal, State, regional and local agencies, transit operators, universities, community-based organizations and the public concerning the scope and content of assigned special projects. The incumbent initiates and maintains internal contact with various functional District staff, Accounting, etc., as well as HQ functional and program areas. The incumbent is expected to maintain a continual dialogue with Department staff and local agency staff, as appropriate.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Have ability to develop and maintain cooperative relationships with other employees and customers. Must be able to sit and/or stand for long durations and perform tasks utilizing a PC. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. Develop insight into situations and apply innovative solutions to make organizational improvements. Formulate effective strategies consistent with the Departments' vision and goals. Create and sustain an organizational culture that encourages others to provide the quality of service essential to high performance.

WORK ENVIRONMENT

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. 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. 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.)

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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