

**POSITION DUTY STATEMENT**

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION Office of Technical Freight and Project Integration	
WORKING TITLE Port & Freight Infrastructure Program Planner	POSITION NUMBER 900-074-4721-XXX	REVISION DATE 11/05/2024

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 a Senior Transportation Planner, the Associate Transportation Planner is a full journey-level position that will assist with supporting the implementation of the Port and Freight Infrastructure Program (PFIP) in accordance with the California State Transportation Agency (CalSTA) adopted Guidelines. The PFIP is a \$1.2 billion one-time funding program to help ease supply chain congestion and increase the State's capacity to move goods.

**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. (Safety First, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Pride)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Integrity)
- **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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Integrity, 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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Integrity)
- **Teamwork and Collaboration:** Sets team structure. Organizes, leads, and facilitates team activities. Promotes team cooperation and encourages participation. Capable of cross functionality and working well with others on a team to achieve personal goals, team goals, and organizational goals. Takes responsibility for individual actions in order to achieve consistent results. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Integrity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - 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, Strengthen Stewardship and Drive Efficiency - Engagement, Integrity)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Integrity, Pride)
- **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, Pride)

**TYPICAL DUTIES:**

Percentage	Job Description
Essential (E)/Marginal (M) <sup>1</sup>	

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35%	E	The incumbent will independently assist, support, and may lead a variety of critical statewide Transportation Planning tasks, which will vary in complexity and sensitivity. Works collaboratively as a member of a multidisciplinary team in the planning, development, administration, and oversight of various Port and Freight Planning studies. Provides contract oversight support to ensure projects stay within scope and schedule. Coordinates with external partners, prepares agendas, make recommendations for meeting topics, develops meeting materials and communications. Tracks and facilitates correspondence, coordination, and communications with stakeholders, and community based organizations.
30%	E	The incumbent reviews and makes recommendations on change requests related to scope, schedule, and cost of awarded projects; prepares, reviews, and submits quarterly progress reports, and monthly reporting to Division management. Reviews and processes invoices consistent with State Contracting Manual, Local Assistance Procedures Manual, PFIP Guidelines, and contract agreements. Ensures projects are closed out on time.
30%	E	Supports the implementation of the PFIP Program. Coordinates responses to action items and inquiries from PFIP awardees, CalSTA, and Caltrans. The incumbent works closely with other Caltrans Headquarters Divisions and Caltrans districts coordinating and collaborating on complex technical issues, develops related guidance documents, prepares legal contracting agreements, and provides technical assistance and training. Tracks Program deliverables and action items to ensure deadlines are met. Prepares annual reports to CalSTA on the status of the Program and individual projects. Represents the Technical Freight and Project Integration Office at meetings, workshops, conferences and other events. Acts as branch representative for technical advisory committees and task forces as needed.
5%	M	Performs other job-related duties within the scope of the classification as assigned

<sup>1</sup>ESSENTIAL 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**

Knowledge of:

- Freight planning, freight operations, supply chain, and logistics.

Caltrans planning and project development process.

- Caltrans Freight Planning, System Planning, and Investment Planning with specific emphasis on trends in national and international goods movement, industry characteristics, inter-modal, and regulatory issues.

-Federal and state legislation as it affects transportation and related areas.

-Federal and state discretionary funding programs.

-Contract management.

-State/Department strategic goals, policies, and practices.

Ability to:

Recognize evolving goods movement issues and challenges, especially with regards to air quality, energy, equity, and the economy; direct the research, analysis, and development of logical and pragmatic recommendations on these issues; write, edit, and review effectively and critically; communicate clearly both orally and in writing; work effectively with others both within and outside the Department to establish and maintain cooperative relationships, particularly on complex and sensitive issues.

Additional Desirable Qualifications:

Ability to develop and maintain effective relationships with regional agencies and private sector for successful on-going interaction; knowledge of freight-related planning work done by Caltrans and its role in providing an effective multi-modal transportation system; multi-disciplinary project management experience; strong interpersonal and presentation skills; ability to develop innovate and effective solutions for transportation problems and effectively implement them; and computer skills, including the use of Microsoft software including MS Teams, Word, Excel, Powerpoint, OneNote, Sharepoint, Smartsheets; ArcGIS; and other software and tools as required.

**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 independently with specific recommendations. Decisions may be made in the absence of his/her supervisor's oversight in situations where immediate action is required. 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

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Department but also regional transportation planning agencies, transit operators and transit service providers.

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### PUBLIC AND INTERNAL CONTACTS

The incumbent is expected to maintain a continual dialogue with Department staff and local agency staff, as appropriate.

Public – The incumbent will have contact with the USDOT, private freight entities/operators, trade groups and developers, Federal Highway Administration, transportation consultants, Metropolitan Planning Organizations, and Regional Transportation Planning Agencies. The incumbent will coordinate projects and efforts with various State agencies, including the California Air Resources Board, Energy Commission, Public Utilities, California Transportation Commission, California High-Speed Rail Authority, other state agencies. Contact will be on a regular (daily to weekly), on-going basis, by phone, mail, and e-mail and in person. On-going contact that establishes effective, two-way communication with our stakeholders and external partners is vital to the success of this position.

Internal – The incumbent will have extensive contact with various divisions and programs across the region and Caltrans HQ.

The incumbent will need to closely collaborate with Sustainability, Planning, and Modal divisions (Research Innovation and System Information, Transportation Planning, Rail and Mass Transportation, Aeronautics), HQ Traffic Operations, Design, Asset Management, as well as the units within Caltrans Districts including Planning, Project Management, Traffic Operations, Programming, Environmental, Sustainability. Contact will be on a daily, on-going basis, by phone, mail, and e-mail, and in person.

On-going contact that establishes effective, two-way communication is vital to the success of this position.

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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Develop and maintain cooperative working relationships. Deal effectively with pressure; and must be able to maintain focus and intensity yet remain optimistic and persistent, even under adversity. Create a work environment that encourages creative thinking and innovation. Enable others to acquire tools and support they need to perform well. Develop new insights into situations and apply innovative solutions to make organizational improvements. Create and sustain an organizational culture, which encourages others to provide the quality of service essential to high performance and productivity. Consider and respond appropriately to the needs, feelings, and capabilities of different people in different situations. Use tact and treat others with respect. Adjust rapidly to new situations warranting attention and resolution.

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### WORK ENVIRONMENT

The incumbent works in front of a computer system under artificial light in an office setting with long periods of working in a sitting or standing position.

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.

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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.)

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EMPLOYEE (Print)

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EMPLOYEE (Signature)

DATE

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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

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SUPERVISOR (Print)

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SUPERVISOR (Signature)

DATE