

POSITION DUTY STATEMENT

DOT PM-0924 (REV 08/2024)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION Assets and Equipment/Rolling Stock Procurement	
WORKING TITLE Rolling Stock Procurement Associate	POSITION NUMBER 900-075-4721-920	REVISION DATE 01/07/2025

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 (Chief, Rolling Stock Procurement Branch), the Associate Transportation Planner is responsible for performing a variety of journeyman-level duties with minimal supervision in support of the Office of Assets and Equipment's rolling stock procurement, contracting, and project delivery functions.

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.

- **Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (Cultivate Excellence - Pride)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety First - Integrity)
- **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 - 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. (Enhance and Connect the Multimodal Transportation Network - Innovation)
- **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)
- **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. (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. (Strengthen Stewardship and Drive Efficiency - Pride)
- **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. (Strengthen Stewardship and Drive Efficiency - Integrity)
- **Organizational Skills:** Keeps work prioritized and organized. Logically approaches situations. (Cultivate Excellence - Innovation)

TYPICAL DUTIES:

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

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40%	E	Develop and manage contracts for railcar, locomotive, and multiple-unit vehicle procurements, to include initiation, request for proposal/ request for quotation (RFP/RFQs), budgeting, maintaining project documentation, paying invoices, reviewing progress reports, and completing contract closeouts. Develop and manage engineering and on-call support contracts, to include initiation, RFP/RFQs, budgeting, maintaining project documentation, paying invoices, reviewing progress reports, and completing contract closeouts. Develop and manage service contracts as needed to support railcar procurements, to include initiation, RFP/RFQs, budgeting, maintaining project documentation, paying invoices, reviewing progress reports, drafting and reviewing task orders, and completing contract closeouts. Perform encumbrance and disencumbrance actions as needed on the Caltrans Advantage financial system and identify funding sources for future contracts, and track grant and bond fund draw-downs.
35%	E	Coordinate with internal Caltrans divisions (Procurements and Contracts, Legal, Budgets, Accounting, Planning and Modal Programs Management, and Local Assistance) to guide contract and project development. Coordinate with external partners, including the Federal Railroad Administration, Amtrak, State-supported intercity passenger rail joint powers authorities, and passenger stakeholders to track and discuss vehicle development, procurement milestones, and technical requirements. Coordinate with on-staff or contracted subject matter experts to recommend appropriate courses of action to resolve technical or administrative challenges with procurements and other contracts.
20%	E	Monitor contractor performance and compliance, to include reviewing monthly progress reports and work products and task order budgets. Monitor procurement activities, to include project funding, contract amendments, correspondence, delivery, deployment requirements, technical discussions, and warranty activities. Analyze project documents, review and respond to contractor and consultant correspondence, and attend meetings with contractors and stakeholders.
5%	M	Prepare project status reports for Caltrans and other State and Federal agencies as required. Perform other job-related 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

Does not supervise. May have lead responsibility in limited tasks.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

- To be familiar with the organization and functions of Caltrans.
- To be familiar with State of California and Caltrans-specific contracting and procurement policies and procedures, project management principles, and methods of State contract administration.
- The ability to be highly organized and to perform and monitor a wide variety of tasks and project functions simultaneously.
- The ability to communicate effectively in telephone, virtual meeting, and written formats. The incumbent will originate and review email and other correspondence and meet with contractors.
- The ability to perform word processing, develop spreadsheets, update databases, and use digital work sharing tools using standard Caltrans tools such as Microsoft Word, Microsoft Office, SharePoint, and Smartsheets.
- The ability to read and understand contracts, terms and conditions, financial reports, and related documents.
- The ability to develop a basic understanding of rail equipment projects, specifications, plans, and other branch functions.
- The ability to use a variety of analytical techniques to resolve contract and funding issues.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for implementation of assigned tasks based on guidelines furnished by the branch chief. Work is performed independently, and incumbent makes recommendations as necessary. Decisions may be made in the absence of the supervisor in situations where immediate action is required. Errors in judgment or inadequacies in recommendations and decisions could result in delays to rail procurement projects, failure to meet project management and accountability requirements, loss of funds, and/or increased project costs, which would negatively impact the State's rail equipment operations and/or project implementation.

PUBLIC AND INTERNAL CONTACTS

The incumbent has considerable contact with employees at various governmental agencies at the local, Federal and State levels; private industry representatives; railroad companies; consultants; and contractors.

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PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

- The ability to work on a typical desktop or laptop computer.
- The ability to work in a cubicle office environment, on-board rail equipment and in manufacturing facilities.
- The ability to focus for long periods of time.
- May require bending, kneeling, and stooping.
- The ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice and develop insights and apply innovative solutions to make organizational improvements.
- The ability to develop and maintain cooperative relationships.

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. Commute expenses to the work location will be the responsibility of the selected candidate, though Caltrans does offer incentives for public transit travel. Employees may be required to travel. Overtime may be required.

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