

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION Policy, Legislation, & Strategic Initiatives Branch	
WORKING TITLE Cross Divisional Programs & Initiatives Management Specialist	POSITION NUMBER 913-155-4721-913	REVISION DATE 03/05/2025

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

GENERAL STATEMENT:

Under the direction of the Chief, Research, Policy, and Strategy Branch, the Associate Transportation Planner will function as the lead on cross-divisional programs and initiatives regarding Planning and Modal Programs (PMP) with minimal instruction. The incumbents will lead the coordination and management of ad hoc initiatives for PMP management and Divisions. The incumbents will also coordinate and manage coordinate the tracking and analysis of funding programs in PMP as well as coordinate with the Office of Strategic Management on strategic management planning goals and performance tracking. The incumbents will also coordinate and support the Deputy Director of PMP on executive staff performance. The incumbent will also coordinate on research initiatives and legislative analysis.

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.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Employee Excellence - Collaboration, Stewardship)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - 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. (Employee Excellence - Collaboration, Integrity, Stewardship)
- **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. (Employee Excellence - Pride)
- **Relationship Building:** The ability to develop and maintain internal and external trust and professional relationships, which includes listening and understanding to build rapport. (Equity - Equity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Collaboration)
- **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. (Employee Excellence - 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. (Employee Excellence - Collaboration)
- **Commitment/Results Oriented:** Dedicated to public service and strives for excellence and customer satisfaction. Ensures results in their organization. (Employee Excellence - Integrity, Stewardship)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	
30% E	Under the direction of the Chief, Policy, Legislation, and Strategic Initiatives Branch, incumbents coordinates and manages the performance of ad hoc transportation planning initiatives at the PMP executive level or those initiatives that include multiple PMP divisions. Independently works on difficult and complex transportation planning projects that involve coordination on projects and programs under PMP and with a level of independence and can act as a lead with minimal instruction. Upon receipt of ad hoc requests regarding transportation planning initiatives needing coordination under PMP, establishes the deadlines, relevant subject matter experts, stakeholders, and sensitivities of the matters. Develops plans to complete each assignment by its required due date. Tracks and manage progress on these ad hoc initiatives. Completes the assignments by the required due dates.

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25%	E	Coordinates and manages the reporting and analysis of PMP-related transportation project funding programs that were augmented or approved in 2022. Updates the funding trackers of transportation project programs and coordinates meetings with managers of transportation project funding programs to track and develop reports on funding program progress to stakeholders. Creates reports as required to communicate the progress on funding program management. Supports owners to ensure milestones (due dates) are documented and tracked.
25%	E	Coordinates with the Office of Strategic Management, and supports PMP divisions in strategic plan management, including developing, assigning, and managing the performance of goals and objectives in the enterprise strategic management plan, the PMP strategic management plans, and their divisions' strategic management plans. Ensures alignment with parent strategic plans. Answers questions about strategic plan development and performance as appropriate.
10%	E	Coordinates and supports the PMP director in developing and documenting annual performance goals and objectives for executive staff and manages quarterly and final updates on performance. Meets with executive staff as appropriate to record their performance and provide updates to Deputy Director, PMP
5%	M	Serves as the PMP liaison for CPRA requests regarding transportation plans, programs, and projects under PMP. Coordinates and develops the appropriate strategies and responses for communication between PM2, Division Points-of-Contacts (POCs), and CPRA coordinators at Headquarters and the District Offices. Coordinates information gathering with Office Chiefs and Division staff, as appropriate, on all CPRA requests.
5%	M	Other duties, such as clerical duties, data entry, map retrieval, and others.

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 incumbents supervises no staff but must be able to develop cooperative and professional working relationships with peers, management, and student assistants. The incumbents will work in a lead capacity on projects and programs.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbents will have extensive knowledge and expertise in the management, operations, funding, marketing, and impact of transportation in the State of California and will be familiar with the basic functioning of land use and transportation in the State. The incumbents must have knowledge of legislative processes and procedures and the basic political functions of the California State Legislature. The incumbents must understand transportation data and how best to interpret and communicate said data. The incumbents must be able to communicate effectively, both in writing and orally, and can develop and maintain effective working relationships, as well as work cooperatively with others. Knowledge of Federal and State laws related to transportation programs. In addition, the ability to work with minimum direction and supervision, to initiate action independently, or as an interdisciplinary team member, and to handle multiple assignments simultaneously is desirable.

The ability to perceive the 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 uses, social, economic, fiscal, legal, and political issues, and effective public participation techniques is also desirable.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbents are responsible for leading and implementing assigned tasks and managing projects through interdisciplinary teams. Work must be completed independently with specific recommendations. Decisions may be made independently where immediate action is required that can have important consequences. 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, local agencies, transit operators, and transit service providers.

PUBLIC AND INTERNAL CONTACTS

The incumbents participate 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, Traffic Operations, Maintenance, etc., as well as HQ functional and program areas. The incumbents are expected to maintain a continual dialogue with Department staff and local agency staff, as appropriate.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbents must have the ability to develop and maintain cooperative working relationships; respond appropriately to difficult situations; recognize emotionally charged issues or problems and acknowledge the various responses without escalating tensions. Must be able to effectively communicate in English and may be required to make presentations, facilitate meetings,

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lead workshops, and serve on quality teams. The incumbents must be able to sit for prolonged periods while using a keyboard/mouse and video display monitor or while reading, preparing, or reviewing documents or attending meetings. Must be capable of sustained mental activity needed for report writing, auditing, problem solving, analysis, and reasoning. Must be able to handle a workload that may be subject to frequent, substantial, and unexpected changes that could affect the scheduling or completion of assignments.

The incumbents must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. Must deal effectively with pressure, maintain focus and intensity, and yet remain optimistic and persistent, even under adversity.

The incumbents behave fairly and ethically toward others and demonstrate a sense of responsibility and commitment to public service. The incumbents value cultural diversity and other individual differences in the workforce.

WORK ENVIRONMENT

The work environment is fast-paced and requires considerable flexibility in managing time, priorities, and assignments. It can be demanding and/or stressful. Incumbents may be required to travel to district offices, other state and federal agencies, and to the project sites. In the field the incumbents may experience all climatic conditions, including rain or snow. Proposed project sites and/or construction sites may be loud, dusty, or dirty and may include rugged terrain.

While at their base of operation, incumbents will work in a climate-controlled office under artificial lighting. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate.

The incumbents must travel occasionally to attend meetings, conferences, seminars, and trainings as directed. The incumbent works in front of a dual-monitor 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's evolving telework policy. Caltrans supports telework, recognizing that in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksites with minimum notification if an urgent need arises. The selected candidate will be required to commute to the headquartered location as needed to meet operational needs. Business travel may be required, and reimbursement considers an employee's designated headquartered 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

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