

**POSITION DUTY STATEMENT**

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION Office of Strategic Investment Planning	
WORKING TITLE Investment Planning Coordinator and Liaison	POSITION NUMBER 900-074-4721-233	REVISION DATE 03/20/2025

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

**GENERAL STATEMENT:**

Under direction of the Senior Transportation Planner, a Branch Chief, within the Office of Strategic Investment Planning (OSIP), the Associate Transportation Planner will focus on policies and strategies related to safety, reducing vehicle miles traveled (VMT), multimodal transportation, accessibility, equity, air quality, environmental sustainability, and reliability. The incumbent will support grant applications for federal discretionary programs, help HQ Programs and Districts with submission materials, and ensure accurate project nominations. In addition, the incumbent may act in a lead capacity on some project initiatives, providing direction and coordination on specific projects. The incumbent will also develop and manage Constant Contact campaigns for Discretionary Funding Opportunities and maintain and update OSIP's internal and external-facing websites weekly. Additionally, the incumbent will assist in creating and maintaining guidance documents for OSIP processes, staying current on USDOT Notices of Funding Opportunities, CTC Program Guidelines, and Caltrans' policies. T

**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. (Safety, Equity, Climate Action, Prosperity - Collaboration, Equity, Innovation, Integrity, People First, Pride)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety, Equity, Climate Action - Collaboration, Equity, Integrity, Pride)
- **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 - 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. (Safety, Equity, Climate Action, Prosperity - Collaboration, Innovation, 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. (Equity, Employee Excellence - Collaboration, Stewardship)
- **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. (Safety, Equity, Climate Action, Prosperity - Collaboration, Equity, People First, Stewardship)
- **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. (Employee Excellence - Collaboration, Integrity, People First, Pride, Stewardship)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Collaboration, Innovation, 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. (Employee Excellence - Collaboration, People First)

**TYPICAL DUTIES:**

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

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40%	E	Create work plans, materials and internal processes for discretionary funding programs, which includes but not limited to, project nomination intake forms, project prioritization protocols and process, fact sheets, applications and letters of support. Serves as a project and discretionary funding program liaison to various Districts and headquarters's modal programs. Provide expert responses and support to the Districts and modal programs. Create Constant Contact Campaigns and maintain OSIP's internal and external websites. Serve as OSIP's Subject Matter Expert (SME) on utilizing the various functions offered on Grants.gov.
20%	E	Have technical specific skills related to data analysis to develop and administer transportation performance measures that facilitate analysis and utilizing existing project lists to identify, score, and prioritize projects for discretionary funding programs contributing to project nominations and evaluations for discretionary funding programs and ensuring that projects align with priorities. These tasks involve working closely with Caltrans Districts, Offices of Economics & Data, Freight, Program and Project Planning, and System Planning, the Division of Rail and Mass Transit, the Division of Financial Programming, and the Senate Bill (SB1) Office.
15%	E	Communicate with internal and external partners and working closely with other divisions and districts regarding current and upcoming Discretionary Funding Opportunities.
10%	E	Analyze, develop, and manage a variety transportation system performance measures including but not limited to: freight and transportation system factors, equity, environmental and air quality factors, and accessibility and economic factors.
10%	E	Serve on technical and project review committees. Provide committees with expert responses and information, compile committee information for provision to Caltrans' staff and management, provide analysis as needed. Maintaining files, preparing correspondence, ADA document remediation, drafting issue memos, analyzing proposed legislation, and other written materials as required.
5%	M	Performs other job-related duties within the scope of the classification as assigned and may occasionally act in place of the Branch Chief, as needed.

<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 position may serve in a lead capacity for some assignments. The incumbent may act in place of the Branch Chief in some instances.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

Knowledge of all phases of transportation planning process; the Department's mission, visions, goals, organization, policies, and procedures; Federal and State laws and regulations; Concepts and terminology relating to transportation planning; and techniques of selecting and managing outside consultants. Must have the ability to effectively communicate (oral and written) with management, technical, and non-technical personnel. Knowledge of system and corridor planning, project development, and programming processes. Ability to develop programs and supporting activities; analyze, interpret and apply analytical techniques; work independently and as a core member on complex planning projects; and work with databases.

**RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR**

Errors in guidance, implementation, coordination, and carrying out Federal law and regulations related to the previously identified planning responsibilities could have negative impacts on the Department and the traveling public. Consequences of errors could lead to Caltrans' Management not having sufficient information to make informed decisions.

**PUBLIC AND INTERNAL CONTACTS**

Daily internal contacts with headquarters and District units including Transportation Planning; Transportation Programming; Rail and Mass Transportation; and others. Frequent reporting and coordination with Caltrans' Management. Frequent involvement with Metropolitan Planning Organizations and Regional Transportation Planning Agencies. Contact with the Directorate and Federal Highway Administration are less frequent but will occur.

**PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS**

Employees may be required to sit for long periods of time using a keyboard and video display terminal.

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### WORK ENVIRONMENT

While at the base of operation, the employee will work in a climate-controlled office under artificial lighting. Employee may also be required to travel to meetings in other office buildings and district offices. It is mandatory that the employee show up in office on Monday and Tuesday and adhere to all current and future Telework Policies.

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.

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.

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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

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WORKING TITLE Investment Planning Coordinator and Liaison	POSITION NUMBER 900-074-4768-XXX	REVISION DATE 03/20/2025

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**GENERAL STATEMENT:**

Under the supervision of the Senior Transportation Planner, a Branch Chief, within the Office of Strategic Investment Planning (OSIP). The Transportation Planner in the Division of Transportation Planning (DOTP), will focus on policies and strategies related to safety, reducing vehicle miles traveled (VMT), multimodal transportation, accessibility, equity, air quality, environmental sustainability, and reliability. The incumbent will assist with grant applications for state and federal discretionary programs, support HQ Programs and Districts with submission materials, and help ensure the appropriate nomination of projects. The incumbent will work with project teams on specific initiatives, coordinating efforts, and providing support on assigned projects. Additionally, the incumbent will help create and maintain guidance documents for OSIP processes, stay current on United States Department of Transportation (US DOT) Notices of Funding Opportunity (NOFO), California Transportation Commission (CTC) program guidelines, and Caltrans' policies.

**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.

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35%	E	Have technical skills to administer transportation performance measures that facilitate analysis and utilize existing project lists to identify, score, and prioritize projects for discretionary funding programs. These tasks involve working closely with, but not limited to, DOTP functional units, Caltrans Districts, Division of Data and Digital Services, the Director's Office, the Division of Rail, and the Senate Bill (SB 1) Program. Analyze, develop, and manage a variety of transportation performance measures including but not limited to: equity, environmental, and economic factors.
25%	E	Serves as a project and discretionary funding program liaison contributing to evaluations of discretionary funding programs, ensuring that projects align with state priorities and NOFO objectives. Updating OSIP's internal and external-facing websites, maintaining the Grant Toolbox, providing guidance on the use of grants.gov, and leading the publication of Constant Contact Campaigns, providing responses to Districts and HQ modal programs regarding current and upcoming NOFOs for discretionary grant programs.
25%	E	Create materials and internal processes for discretionary grant programs, including but not limited to, project nomination intake forms, project prioritization protocols and processes, fact sheets, applications, and letters of support. Maintaining files, preparing correspondence, remediating documents to comply with The Americans with Disabilities Act (ADA), and analyzing proposed / existing legislation and other written materials as required.
10%	E	Assist in the development of issue memorandums and letters of support, ensuring compliance with established red folder guidelines, and serve as a member on technical and project review committees to evaluate and select projects for funding opportunities. Provide committees with expert responses and information, compile committee information for provision to Caltrans staff and management.
5%	M	Performs other job-related duties within the scope of the classification as assigned.

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MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

**SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS**

This position does not supervise.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

Knowledge of all phases of transportation planning process; the Department's mission, visions, goals, organization, policies, and procedures; Federal and State laws and regulations; Concepts and terminology relating to transportation planning; and techniques of selecting and managing outside consultants. Must have the ability to effectively communicate (oral and written) with management, technical, and non-technical personnel. Knowledge of system and corridor planning, project development, and programming processes. Ability to develop programs and supporting activities; analyze, interpret and apply analytical techniques; work independently and as a core member on complex planning projects; and work with databases.

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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.

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EMPLOYEE (Print)

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)

SUPERVISOR (Signature)

DATE

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