

POSITION DUTY STATEMENT

DOT PM-0924 (REV 08/2024)

CLASSIFICATION TITLE Sr Transportation Planner	OFFICE/BRANCH/SECTION Rail/Planning and Implementation	
WORKING TITLE Strategic Investment Planner	POSITION NUMBER 900-075-4724-920	REVISION DATE 02/14/2025

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 general direction of the Office Chief for Rail Planning and Implementation, a Supervising Transportation Planner, the Senior Transportation Planner acts as a technical expert performing the most difficult and complex work of statewide significance which is critical to the Department's basic mission by planning, organizing, and managing the Office's investment planning work. The Senior Transportation Planner will provide subject matter expertise based on knowledge of State Rail Plan service goals and financial programming requirements for individual programs. This position requires strategic thinking skills, and a deep commitment to the Department's strategic vision, mission, values and goals, and advancing equity in the state through all efforts.

CORE COMPETENCIES:

As a Sr 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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Innovation, Integrity)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - 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, Equity, 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 - Integrity, Pride)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement)
- **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, Enhance and Connect the Multimodal Transportation Network, Advance Equity and Livability in all Communities - Engagement, Equity)
- **Forward Thinking:** Anticipates the implications and consequences of situations and takes appropriate actions to be prepared for possible contingencies. Anticipates and prepares for future developments. (Strengthen Stewardship and Drive Efficiency - Integrity)
- **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, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency - Integrity)

TYPICAL DUTIES:

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

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40%	E	The incumbent acts as a technical expert performing the most difficult and complex work by tracking all relevant funding programs for the Division of Rail including Federal, State, and other funding programs. This will include knowing the expected Notice of Funding Opportunity dates, application due dates, fund cycles, etc. The incumbent will work to ensure eligibility for the department, the project and to determine funding capacity and matching requirement. Works with Rail planning staff and Regional Coordinators to update and manage the capital project database to remain current and accurate. Develop funding strategies for priority capital projects in coordination with Regional Coordinators and Office Chief; coordinate, develop, and prepare applications for single and multi-year local, state and federal grants/ funding opportunities; and identify sources of all grant funding and other funding committed to State Rail Plan projects. Take a lead role to complete the funding/grant application packages including, but not limited to, participating in meetings with the Regional Rail Coordinators and other staff related to the projects and gain in-depth understanding of the projects in the State Rail Plan.
35%	E	Acts as a technical expert and programming liaison. Provides consultation, direction and guidance as the subject matter expert for program guidelines, processes/procedures, and deadlines. Works as the point of contact for the department's Financial Programming group and for the Project Delivery team in the Division of Local Assistance. Extensive coordination and communication is required with internal and external partners, including Division of Rail Offices, Division of Financial Programming, Division of Local Assistance. The incumbent tracks the status of projects, which includes the funding needs for each phase of the project, the total project funding necessary, and how much funding has been secured for each phase of the project.
15%	E	Identifies and solves for gaps in grant application needs. Manage the Letter of Support requests for external partners, as applicable. Manages the Benefit Cost Analysis of any grant application submittal to ensure technical rigor and that they meet grant rules. Managing the Benefit Cost Analysis may include proactively working as a technical expert with relevant staff and partners to complete grant requirements in advance of application deadlines.
5%	M	Works as the subject matter expert for California Transportation Committee (CTC) programs, guidelines, processes, deadlines, etc. Works as the point of contact for CTC staff. Performs 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

The position does not supervise. However, this position acts as a project manager or team leader and in that capacity, directs the work of others.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

- Knowledge of Caltrans Mission, Vision, Goals, strategic objectives, programs, laws, regulations and policies of the State of California and federal government regarding various State and federal transportation competitive fund programs, Caltrans principles and practices of transportation planning, asset management, and various phases of project development.
- The ability to communicate effectively (written and oral) with management and technical/non-technical personnel and work cooperatively with staff from a variety of Headquarters and District Divisions and with external agencies.
- The ability to work independently and as a core member on complex assignments; write creatively and persuasively; research, analyze, and interpret technical data; organize data and information in an easy-to-understand format by preparing clear and concise reports and professional presentations; collaborate effectively in an interdisciplinary team and with other divisions and programs, both written and oral with all levels of staff; interpret federal and state grant guidelines.
- The ability to make timely decisions, develop technically-sound approaches and solutions in developing consensus among stakeholders, perform effectively under stressful situations with strict time constraints, prioritize critical assignments, and quickly adapt to changing priorities to meet immediate deadlines.
- Possessing intermediate to advance skills in Excel, Word, Powerpoint, and Adobe.
- Possessing general knowledge of the guiding principles of the Climate Action Plan for Transportation Infrastructure, investment planning strategies, various Caltrans databases, multi-modal system and corridor planning, grant application process, and programming process.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Errors or omissions could result in violations of statutory requirements, causing audit citations or lawsuits against the state by local agencies, private contractors or labor unions. Poor judgment could result in delays in completion of the Department's or other agency programs and loss of public trust.

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PUBLIC AND INTERNAL CONTACTS

Internal and external contacts with outside consultants, professional personnel from other functional units, other Districts, and Headquarters/DPAC may be required, as needed. This position requires strong communication (written and oral), partnerships, and excellent customer services.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employees may be required to sit for long periods of time using a keyboard and video display terminal. Requires the ability to develop and maintain cooperative working relationships. Must be able to sustain mental activity as needed for problem resolution, report writing, analysis, and reasoning.

WORK ENVIRONMENT

The incumbent should have the ability to work within Caltrans employer-driven telework program and to work from a Caltrans office when required. While at their base of operation, employees will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. 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 headquarterd location as needed to meet operational needs. Business travel may be required, and reimbursement considers an employee's designated headquarterd location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to the headquarterd 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
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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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