

**POSITION DUTY STATEMENT**

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION Planning, Policy and Program Development	
WORKING TITLE Planning and Policy Research Associate	POSITION NUMBER 913-155-4721-020	REVISION DATE 04/08/2025

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 Senior Transportation Planner, the incumbent is responsible for managing and developing research on transportation planning and policy issues, as well as new technologies that improve the performance of the transportation systems and methods of planning and analysis. Areas of endeavors include but are not limited to system, regional, corridor, and community planning; transit-oriented development; smart growth; goods movement; environmental, economic, and equity issues; Intelligent Transportation Systems (ITS); and transportation finance. Well-rounded experience in planning is essential to serve the needs of our customers who need subject-area expertise assistance with the research process.

**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, Employee Excellence - Equity, Innovation, Integrity, Pride)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Equity, Employee Excellence - Innovation, Stewardship)
- **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. (Climate Action, Prosperity, Employee Excellence - Equity, Innovation, 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. (Equity, Climate Action - Collaboration, Innovation, Stewardship)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Equity - Integrity, Pride, 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. (Equity, Climate Action - Innovation, Pride, Stewardship)
- **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 - Integrity)
- **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. (Equity, Employee Excellence - Innovation, Integrity, Pride)
- **Technical Expertise:** Depth of knowledge and skill in a technical area. (Equity - Innovation, Integrity, Pride)

**TYPICAL DUTIES:**

Percentage	Job Description
Essential (E)/Marginal (M) <sup>1</sup>	
40% E	As a task/project manager, manages transportation planning, policy, and new technology research projects. Typical tasks include financial and project tracking, preparing research contract solicitations, selecting researchers, writing and reviewing reports, processing invoices, approving deliverables, and continually interacting with research center staff, research project panels, and researchers.

**POSITION DUTY STATEMENT**

DOT PM-0924 (REV 01/2025)

30%	E	Coordinates with customers by collecting, analyzing, and reporting on data and plans, identifying departmental research needs, reviewing research proposals, and implementing research results. Participates in Technical Advisory Panel (TAP) meetings as the Division representative and/or technical expert and assists in the dissemination of research results. In addition, fosters and coordinates the development and maintenance of partnerships among public, private, and academic entities and helps support external panels and other working groups.
20%	E	Develops and implements innovative and high-risk “out-of-the-box” research proposals that address medium to long-term research needs or immediate research needs that the Department’s TAPs have not addressed. Propose research to national organizations. Examines and reports on national research, best practices, research conducted by California’s University Transportation Centers, and research conducted by external organizations. Reviews and comments on State and Federal legislation. Prepares issue memos and other written reports. Sits on panels and participates as a subject-area expert, sometimes delivering presentations.
10%	M	Leads or assists in the planning and implementation of technology demonstrations, pilot programs, meetings, conferences, workshops, seminars, training programs, or other special events needed to disseminate information on planning and policy research, including integration of multi-modal transportation services and technology deployment.

<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**

Does not supervise others. The Incumbent may, however, act as lead workers. The associate level is a full journey level, undertaking more technical and complex elements of the work. Assignments may be generated by requests from the Department’s management, Districts, or other headquarters units.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

Requires knowledge of the multimodal transportation planning process and the contract administration process. The incumbent is familiar with transportation planning, programming, and finance issues; the legislative process; and the relationship of transportation to land use and environmental planning, including basic knowledge of State and Federal air quality laws and regulations. The incumbent is conversant with the principles of public information, public participation, marketing, public administration, training, technology transfer, and models for public/private partnerships. Should be familiar with the Department’s research programs, including the research project selection and approval processes.

Must be able to plan, organize, and direct research efforts through consultants (especially from academia) and cooperate with governmental agencies and other partners. Completes staff work, including analysis of issues; manages projects within time and budget constraints, including preparing and monitoring monthly, quarterly, or other reports; works effectively with advisory and steering committees, governmental agencies, the private sectors, the academic communities, other institutions, and the public; communicates effectively, both orally and in writing, and presents controversial and complex reports clearly and succinctly. Effectively recommends policy and know or be willing to learn computer applications of Microsoft Word (word processing), Microsoft Excel (spreadsheets), and FileMaker Pro (databases) and be able to navigate the internet.

Perceive trends, needs, problems, and deployment opportunities and propose research directions that lead to successful outcomes. Seeks research solutions that can be implemented within the Department’s mission and resources framework. Research, analyze, and make recommendations on national research programs.

**RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR**

The amount of public sector investment to be made available for deployment of research results (and the creation of jobs) will depend largely on the quality of research and institutional cooperation in the state. Consequences of ineffective research includes missed opportunities for reduced Department expenditures and ineffective use of public funds. In the long term, consequences would result in less-effective planning alternatives for policy makers and, therefore, less efficient provision of transportation facilities and services.

**PUBLIC AND INTERNAL CONTACTS**

The incumbent has frequent contact with many Division and Department managers, staff, academic personnel, consultants, other public (local California, Federal government, and other states) employees, and industry representatives. The Incumbent may also meet with the staff of transportation service providers, users of the transportation system, and other transportation interest groups. The incumbent provides comments and may provide testimony at public meetings and institutional forums.

**PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS**

Working hours will be set between 6:30 a.m. and 6:00 p.m. The Incumbent may be required to travel in-state and possibly out-of-state. The Incumbent will be required to sit for long periods using a keyboard and video display terminal. This position requires interactions with many people in a cooperative manner and the ability to deal effectively with pressure, maintaining focus and

**ADA Notice**

This document is available in alternative accessible formats. For more information, please contact the Forms Management Unit at (279) 234-2284, TTY 711, in writing at Forms Management Unit, 1120 N Street, MS-89, Sacramento, CA 95814, or by email at Forms.Management.Unit@dot.ca.gov.

## POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

---

intensity – yet remaining optimistic and persistent, even under adversity. The Incumbent must be open to change when presented with new information and adapt behavior and work methods that respond to new information, changing conditions, or unexpected obstacles. The Incumbent must behave fairly and ethically toward others and demonstrate a sense of responsibility and commitment to public service. The Incumbent must value cultural diversity and other individual differences in the workforce.

---

### WORK ENVIRONMENT

The Incumbent must multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. The Incumbent must be able to concentrate to review and create documents and meet strict deadlines. The Incumbent must be able to efficiently use office equipment such as copiers, facsimile machines, and document scanners.

This position reports to the office two days a month. The amount of telework is at the discretion of the Department and is 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 consider an employee's designated Headquarters Location and 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