

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION DOTP, Operations Support and JPA Coordination Branch EFFE	
WORKING TITLE ICR Corridor Oversight and JPA Liaison	POSITION NUMBER 900-075-4721-920	REVISION DATE 04/16/2024

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 the Chief, Operations Support and JPA Coordination Branch, the employee performs a variety of work tasks associated with Joint Powers Authority (JPA) and Intercity Rail Corridor oversight, Intercity Rail operations data analysis and reporting, and transportation planning activities. Monitor JPA activities to ensure they are consistent with the goals of the State Rail Plan and participate in network integration planning activities, which could be in a lead staff capacity as the staff representative for the corridor. Up to 20% travel and occasional overtime may be required.

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.

- **Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Decision Making**: Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **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. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, 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, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Teamwork/Partnership**: Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **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. (Safety First, Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Analytical Skills**: Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, 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. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)

ADA Notice

For individuals with sensory disabilities, this document is available in alternate formats. For alternate format information, contact the Forms Management Unit at (279) 234-2284, TTY 711, or write to Records and Forms Management, 1120 N Street, MS-89, Sacramento, CA 95814.

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

TYPICAL DUTIES:

Percentage		Job Description
Essential (E)/Marginal (M) ¹		
20%	E	Joint Powers Authorities (JPA) Liaison/Business Operations Support: Serves as lead JPA liaison working closely and collaboratively with State-supported intercity passenger rail JPA staff to monitor performance of intercity passenger rail corridors based on State goals and measures designed to improve operational efficiency, reduce intercity operations costs, and otherwise advance State Rail Plan service goals in the corridors. Support analysis of operations related issues and implementation of improvements based on direction for the California State Transportation Agency (CalSTA) and Caltrans management through participation in technical working groups as needed and directed by management. Technical support activities could cover analysis of Annual Business Plans, budgets and operations costs trends, operational performance based on uniform performance measures, proposals for schedule and operations changes, capital maintenance needs, and evaluation of statewide marketing initiatives.
20%	E	Rail Planning Program Support: Works independently on State Rail Plan development, complex service planning analysis and support, including analysis and evaluation of service change proposals for the state-supported intercity passenger rail corridors and connecting bus routes, and participation in other Caltrans transportation planning studies and projects as needed.
20%	E	Contract Development and Business Operations: Independently leads the development of contract MFTA supplements that are consistent with the Interagency Transfer Agreements including scope of work, amendments, and correspondence. Independently monitors sub-contractor performance, identify performance issues and develop a plan for resolution. Monitor project budget, including any applicable funding lapse dates. Monitor JPA adherence to ITA and MFTA supplements. Review of JPAs' draft Amtrak Operating agreements for approval by the Division. Review JPA annual business plans and identify areas that should be addressed by CalSTA or Caltrans. Prepare draft CalSTA annual business plan approval letters for assigned JPA. Serves as primary lead in the development of the JPA operations budgets. Prepares the documents necessary to encumber JPA budgets approved by CalSTA, including the ADM 360, CAS/CAM and CT requests. Review and process invoices for payment, including preparation of a Receiving Record for Administration, Marketing, Operations, Minor Capital, and other approved JPA expenditures. Lead in the review and analysis of the financial quarterly and yearly reconciliations provided by JPAs. Answer external and internal audit requests.
15%	E	Statistical Analysis and Reporting: Independently gathers and maintain complex database of statistical and financial data for the three State-supported Intercity rail routes in California, such as ridership, On-time Performance, passenger miles, ticket revenue, and operational expenses. Analyzes data to identify and determine information such as farebox recovery, ridership changes, revenue by passenger, revenue by passenger mile, average trip length, and capacity of existing trains. Identify trends and potential issues regarding Intercity rail performance data and make recommendations for improvements. Develop projections based on things such as inflation, population growth, service increases, etc. Responsible for various reporting requirements including, but not limited to the Uniform Performance Standards Quarterly Report, the Caltrans Strategic Management Plan Quarterly Report, the CTC Intercity Passenger Rail Operations Quarterly Report, and the Caltrans Mile Marker. Monitor JPA performance in relation to their annual goals outlined in JPA Annual Business Plans.
10%	E	Data Requests: Responds to data requests from a variety of internal and external groups including, but not limited to, CalSTA, CTC, Director's Office, Public Information Office, local government entities and committees such as the Los Angeles-San Diego-San Luis Obispo Rail Corridor Agency (LOSSAN), San Joaquin Joint Powers Authority (SJJPA), and Capital Corridor Joint Powers Authority (CCJPA).
10%	E	State Rail Assistance (SRA) Program: Monitor and track project requests and reports from agencies awarded SRA funding from the California Transportation Agency (CalSTA). Track allocations, prepare award letters, and serve as a Department subject matter expert on the program.
5%	M	Create correspondence, memos, reports, and presentations

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.

ADA Notice

For individuals with sensory disabilities, this document is available in alternate formats. For alternate format information, contact the Forms Management Unit at (279) 234-2284, TTY 711, or write to Records and Forms Management, 1120 N Street, MS-89, Sacramento, CA 95814.

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

Does not supervise, but may act as lead worker for special projects or team activities.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Strong writing and analytical skills, and the use of Microsoft Office including Excel, the ability to create spreadsheets, graphs, and reports is required. Experience with contract management, public affairs, intercity passenger rail, conducting business with Amtrak, railroads, contractors, consultants and other government agencies is highly desirable. The ability to work independently and as part of a team, possess excellent written and communication skills, and to work under deadline pressure are necessary attributes.

The employee will be responsible for applying critical thinking and logic to complex and difficult operational and statistical problems. The employee is responsible for developing efficient methods for organizing and completing work. The employee must interpret instruction from various sources, develop alternatives and solutions in order to recommend effective courses of action, and then complete assignments clearly, concisely and on time. Requires a high level of completed staff work.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for implementation of assigned tasks based on guidelines furnished by his/her supervisor. Work is then completed independently and recommendations made in challenging situations. Decisions may be made in the absence of his/her supervisor in situations where immediate action is required.

Consequences of errors in judgment or inadequacies in recommendations and decisions could result in the inability of the State to protect its interests and loss of program funding.

PUBLIC AND INTERNAL CONTACTS

The employee has daily contact with all levels of Division staff, external partners, Amtrak, the public and other government agencies.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Ability to use a personal computer; manual dexterity; sitting for long periods; develop and maintain cooperative relationships; ability to focus for long periods of time. Requires occasional bending, stooping and kneeling and lifting materials up to 20lbs, use a hand truck, and the ability to move and set up AV components, and trade show booth.

Must have the ability to multi-task, adapt to changing priorities, and complete tasks or projects with short notice. Develop new insights into situations and apply innovative solutions to make organizational improvements.

Must have the ability to conduct inspection of state owned railroad equipment and rail facilities.

WORK ENVIRONMENT

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.

Employee will be required to travel. Overtime may be required.

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.

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

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.)

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
