

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Sr Transportation Planner	D5 Division of Transportation Planning & Local Assistance	
WORKING TITLE	POSITION NUMBER	REVISION DATE
System & Investment Planning Branch Chief	905-800-4724-012	07/01/2025

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

GENERAL STATEMENT:

Under the general direction of the Office Chief for Transportation Planning & Local Assistance (TPLA), a Supervising Transportation Planner, you are a valued member of the District 5 team supervising staff to deliver key products and perform activities of the Planning program. Within an assigned geographic area, you are responsible for managing delivery and production of Multi-modal System Planning and Investment Planning work. Additionally, you are responsible for the integration and implementation of Smart Mobility, Climate Change as well as integration of modal programs including Freight, Active Transportation, and Mass Transportation.

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.

- Change Leadership:** Develops new and innovative approaches needed to improve effectiveness and efficiency of work products. Encourages others to value change. Considers impact and recommends changes. (Safety, Equity, Climate Action - Equity, Innovation, Integrity, Pride, Stewardship)
- Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety, Equity, Climate Action - Equity, Innovation, Integrity, Pride, Stewardship)
- 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, Equity, Climate Action - Equity, Innovation, Integrity, Pride, 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. (Safety, Equity, Climate Action - Equity, Innovation, Integrity, Pride, Stewardship)
- Empower Others:** Convey confidence in employees' ability to be successful, sharing significant responsibility and authority; allowing employees freedom to decide how they will accomplish their goals and resolve issues. (Safety, Equity, Climate Action - Equity, Innovation, Integrity, Pride, Stewardship)
- Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Safety, Equity, Climate Action - Equity, Innovation, Integrity, Pride, 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. (Safety, Equity, Climate Action - Equity, Innovation, Integrity, Pride, Stewardship)
- 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. (Safety, Equity, Climate Action - Equity, Innovation, Integrity, Pride, Stewardship)
- Managing Performance:** Responsible for employee performance, setting clear goals and expectations, tracking progress against departmental and unit goals, providing feedback, and addressing performance issues promptly. (Safety, Equity, Climate Action - Equity, Innovation, Integrity, Pride, Stewardship)

TYPICAL DUTIES:

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

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

40%	E	<p>Responsible for timely delivery, update and maintenance of plans, information and data for Transportation System Planning, including but not limited to the District System Management Plan, Transportation Concept Reports, Corridor System Management Plans as well as other corridor studies or special plans. System Planning activities and products integrates all modes and is conducted in coordination with other units within and outside of Transportation Planning.</p> <p>Promotes activities that contribute to the Department’s mission, vision and goals, including but not limited to, the implementation of the California Transportation Plan 2040. Promote the integration of System Plans with the development of Metropolitan and Regional Transportation Plans and Sustainable Communities Strategies to address needs for multi-modal planning, Complete Streets as well as Climate change resiliency and adaptation.</p> <p>Coordinates to facilitate the transfer of System Planning information into Regional Transportation Plans and local plans to support prioritization for funding and implementation of projects on the state highway system. Coordinate System Planning information and objectives as part of the Intergovernmental Review process and into Advanced Planning for project initiation. Participate in project delivery to ensure System Planning objectives are carried through.</p>
40%	E	<p>Provide technical support to the District 5 Investment Planning program and activities including but not limited to State Programs (including and not limited SB1, ITIP, RIP, Reconnected Communities etc) and Federal funding programs (including and not limited to INFRA, MEGA, RURAL, IJA etc.). Technical support for the coordination internally and externally on application materials, recommendations of potential funding opportunities for projects in the "Pipeline," coordination and development of materials and response to input from external, HQ, CTC and CalSTA input. Administration of grants funds awarded for transportation planning activities for successful recipients of funds.</p>
15%	E	<p>Responsible for planning, assigning, monitoring and balancing workload among the staff in the branch. Lead effective teams to perform work. Coordinate with other units within Planning for delivery of work products, when appropriate. Promote effective staff development activities that include but are not limited to coaching, mentoring, training and succession planning. Responsible for providing clear communication and direction to staff and providing regular feedback related to job performance in addition to conducting regular performance reviews. Conduct regular safety meetings.</p>
5%	M	<p>Support Division administrative responsibilities, including but not limited to, operating and personnel budgeting, procurement and training.</p>

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 incumbent will have direct supervision over others, and will be required to lead employees to accomplish projects or tasks at the direction of the Office Chief.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Must have strong knowledge of transportation planning. Must have excellent writing abilities and be able and willing to produce deliverables and meet agreed upon project milestones. Must have the ability to work independently and with interdisciplinary teams composed of Caltrans staff, local agency staff, and consultants. Must have the ability to plan, organize, prioritize, and complete assigned work. Must have the ability to establish and maintain cooperative relationships with state, federal, regional, and local agencies, the public, and other units within Caltrans. Must communicate effectively, both orally and in writing. Must be willing to take independent action in carrying Caltrans directives. Must have working knowledge of Adobe Acrobat and Microsoft.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Consequences of error could be significant in terms of adversely affecting the Department’s credibility and standing in the community, particularly with local community leaders and elected officials. Additionally, project delays could adversely effect funding and the capital program.

PUBLIC AND INTERNAL CONTACTS

The position requires regular contact with appropriate district and headquarters functional staff in addition to local agency staff, decision-makers and consultants. Routinely assist in coordinating and communicating with local and tribal governments, various state and federal agencies, community-based organizations (CBO’s) and the general public. Will be required to prepare the Senior TP and/or management for public information meetings, public hearings, and individual meetings with these entities. Will be responsible as a Caltrans PDT member for stewarding outcomes and recommendations from public engagement efforts.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

regional planning process, and Multi-Modal Systems Planning efforts through the capital development process.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The employee may be required to sit for long periods of time using a keyboard and video display terminal. Must be able to develop and maintain cooperative working relationships; be tactful and treat others with respect. The incumbent is expected to accept personal responsibility for successfully meeting delivery milestones and exercise sound, professional judgment and tact. There is also an expectation that all employees will honestly report their time and communicate with the STP regarding leave requests. The incumbent is also expected to be somewhat flexible as assignments and duties can change over time. Also, occasional overtime may be required to meet the operational needs of the Division and the Department.

WORK ENVIRONMENT

While at their base of operation, employee will work in a climate-controlled office under artificial lighting. Travel for this position is required which may occasionally include overnight travel.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and 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 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.

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