

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Sr Transportation Planner	OFFICE/BRANCH/SECTION Office of Technical Freight & Project Integration	
WORKING TITLE Freight Data and Performance Specialist	POSITION NUMBER 900-074-4724-118	REVISION DATE 10/28/2025

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

GENERAL STATEMENT:

Under general direction of the Office Chief for Technical Freight & Project Integration, a Supervising Transportation Planner, the Senior Transportation Planner serves an important role in supporting the Department to make freight transportation decisions on a data-and performance-driven approach. The incumbent serves as the technical expert in leading, coordinating, developing, and implementing the Department's specialized freight data analysis and performance measurement activities. The incumbent is also responsible for leadership and coordination in the implementation efforts resulting from federal and state legislation and policies that involve national, state, and interregional freight data and performance measurement. The incumbent is responsible for working on behalf of the Division of Transportation Planning with other Caltrans units to manage freight data, develop tools and applications harnessing freight data, execute freight data and performance analyses, and monitor and report on statewide freight performance.

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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, 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, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, 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, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Relationship Building:** The ability to develop and maintain internal and external trust and professional relationships, which includes listening and understanding to build rapport. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, 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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, 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, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- **Technical Expertise:** Depth of knowledge and skill in a technical area. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride)

TYPICAL DUTIES:

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

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40%	E	Serve as the technical subject matter expert for a variety of internal and external freight-related data associated with all modes of freight such as trucking, maritime shipping, rail, air cargo, pipeline, and intermodal. Acquire and analyze freight data from federal, state, local and other freight-related agencies to improve statewide understanding of the freight system and trade trends as it relates to impacts to the state's roadways, seaports, airports, and ports of entry. Develop data analysis tools and systems or utilize existing systems and tools for storing, maintaining and analyzing data. Develop scope of works and manage contracts involving the procurement and analysis of proprietary freight data. Lead Department efforts to utilize freight data to inform decisions relating to the planning, programming, and implementation of transportation improvements. Lead Caltrans freight Performance Measure (PM3) reporting efforts in coordination with other data-related functions within Caltrans.
30%	E	Direct and participate with internal and external stakeholders on freight studies and freight related research to support and foster California's freight and goods movement-dependent sectors including the analysis of freight and the economy, transportation mobility, and environmental issues. Collaborate with other state agencies, academic institutions, seaports, airports, trucking and warehousing, rail, shippers, logistics, and other entities to identify data sharing and collaborating opportunities. Leverage initiatives from other states and academia to develop pilot opportunities, alternative data gathering techniques, and other viable innovative activities in response to changes to the freight transportation sector. Maintain awareness of current research and emerging technology and methods with regards to freight data collection, management, analysis, and reporting. Establish and maintain relationships with freight data experts, such as industry, data providers, and academia.
15%	E	Work cross-functionally with internal partner Divisions, Districts, and Offices to support freight data collection, analysis, summary, reporting, and visualization to strengthen our freight engagement, planning, and programming. Develop materials to support collaboration efforts with the other Offices within the Division of Transportation Planning; Divisions of Research, Innovation, and System Information; Division of Rail and Mass Transportation; Division of Traffic Operations; Division of Sustainability; and Division of Financial Programming. Develop and provide technical trainings to internal and external stakeholders. Coordinate with Caltrans Traffic Operations regarding truck-related data including truck census, weigh-in-motion, oversize/overweight permits to utilize for transportation planning related efforts.
5%	E	Provide support for freight engagement efforts including the California Freight Advisory Committee, regional forums, public workshops, community events, special freight committees, etc. Respond to Caltrans Management, partner state agencies, elected officials, and other entities in state and federal leadership roles for special projects and information requests relating to freight and freight performance.
5%	M	Represent Caltrans at various national and state freight-related data panels, committees, forums, and groups, including Transportation Research Board, American Association of State Highway and Transportation Officials, etc.
5%	M	Represent the freight program and/or the Office Chief of Technical Freight and Project Integration in their absence at meetings with internal and external partners as a technical expert on freight planning, infrastructure, and related policy. Participate in special projects, as needed. Perform other administrative tasks or other work as directed by management. Perform 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 have supervisory duties but may be asked to oversee the work of entry and journey level staff.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

- Freight planning, freight operations, supply chain, and logistics.
- Transportation and project development processes.
- Transportation planning with specific emphasis on trends in national and international goods movement, industry characteristics, inter-modal, and regulatory issues.
- Federal and state legislation as it affects transportation and related areas.
- Federal and state discretionary funding programs.
- Contract management.
- State/Department strategic goals, policies, and practices.

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Ability to:

Recognize evolving goods movement issues and challenges, especially with regards to air quality, energy, equity, and the economy; direct the research, analysis, and development of logical and pragmatic recommendations on these issues; write, edit, and review effectively and critically; communicate clearly both orally and in writing; work effectively with others both within and outside the Department to establish and maintain cooperative relationships, particularly on complex and sensitive issues.

Additional Desirable Qualifications:

Ability to develop and maintain effective relationships with regional agencies and private sector for successful on-going interaction; knowledge of freight-related planning work done by Caltrans and its role in providing an effective multi-modal transportation system; multi-disciplinary project management experience; strong interpersonal and presentation skills; ability to develop innovate and effective solutions for transportation problems and effectively implement them; and computer skills, including the use of Microsoft software including MS Teams, Word, Excel, Powerpoint, OneNote, Sharepoint, Smartsheets; ArcGIS; and other software and tools as required.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent maintains contacts outside of the Department concerning transportation system planning and goods movement issues, including but not limited to USDOT, Federal Highway Administration, Federal Railroad Administration, Metropolitan Planning Organizations, Regional Transportation Planning Agencies, trade groups, warehouse operators, trade associations, trucking groups and companies, and with other state, federal, and local transportation decision makers. Failure to adequately consider the political aspects or to fully evaluate the fiscal, economic, social, and environmental effects of a decision, action, or communication could negatively affect the Department's capability to reasonably implement policies, programs, or projects in a reasonable and cost effective fashion to improve mobility, could delay project delivery, and could result in the inefficient use or loss of funding.

PUBLIC AND INTERNAL CONTACTS

Public – The incumbent will have contact with the USDOT, private freight entities/operators, trade groups and developers, Federal Highway Administration, transportation consultants, Metropolitan Planning Organizations, and Regional Transportation Planning Agencies. The incumbent will coordinate projects and efforts with various State agencies, including the California Air Resources Board, Energy Commission, Public Utilities, California Transportation Commission, California High-Speed Rail Authority, other state agencies. Contact will be on a regular (daily to weekly), on-going basis, by phone, mail, and e-mail and in person. On-going contact that establishes effective, two-way communication with our stakeholders and external partners is vital to the success of this position.

Internal – The incumbent will have extensive contact with various divisions and programs across the region and Caltrans HQ. The incumbent will need to closely collaborate with Sustainability, Planning, and Modal divisions (Research Innovation and System Information, Transportation Planning, Rail and Mass Transportation, Aeronautics), HQ Traffic Operations, Design, Asset Management, as well as the units within Caltrans Districts including Planning, Project Management, Traffic Operations, Programming, Environmental, Sustainability. Contact will be on a daily, on-going basis, by phone, mail, and e-mail, and in person. On-going contact that establishes effective, two-way communication is vital to the success of this position.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Develop and maintain cooperative working relationships. Deal effectively with pressure; and must be able to maintain focus and intensity yet remain optimistic and persistent, even under adversity. Create a work environment that encourages creative thinking and innovation. Enable others to acquire tools and support they need to perform well. Develop new insights into situations and apply innovative solutions to make organizational improvements. Create and sustain an organizational culture, which encourages others to provide the quality of service essential to high performance and productivity. Consider and respond appropriately to the needs, feelings, and capabilities of different people in different situations. Use tact and treat others with respect. Adjust rapidly to new situations warranting attention and resolution.

WORK ENVIRONMENT

Employee may be required to travel within California and out-of-state to meet with customers, serve on panels, and participate in meetings and conferences.

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 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.

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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.

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