

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION Office of Assets and Equipment/Fleet Management Program	
WORKING TITLE Associate Transportation Planner	POSITION NUMBER 900-075-4721-920	REVISION DATE 04/22/2025

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 direction of a Senior Transportation Planner (Chief, Fleet Management Program Branch) in the Office of Assets and Equipment (OAE) within the Division of Rail (DOR), the Associate Transportation Planner will independently work on difficult and complex fleet planning and project management for California passenger rail fleet planning and deployment, as well as development, execution, and management of associated contracts and agreements. The Associate Transportation Planner leads the fleet planning and deployment efforts in cooperation with other OAE staff, joint powers authority staff, and OAE consultants.

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.

- **Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency - Engagement, Innovation, Integrity)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety First, Strengthen Stewardship and Drive Efficiency, Lead Climate Action - Engagement, Equity, Innovation)
- **Continuous Professional Development:** Seeks to obtain knowledge and improve performance while supporting others in doing the same. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency - Engagement, 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. (Safety First, Cultivate Excellence, Advance Equity and Livability in all Communities - Equity, Innovation, Integrity)
- **Relationship Building:** The ability to develop and maintain internal and external trust and professional relationships, which includes listening and understanding to build rapport. (Safety First, Cultivate Excellence, Lead Climate Action - Engagement, Integrity, Pride)
- **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 First, Strengthen Stewardship and Drive Efficiency, Lead Climate Action - Engagement, Innovation, Pride)
- **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. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency - Engagement, Integrity, Pride)
- **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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency, Lead Climate Action - Equity, Innovation, Integrity)
- **Diagnostic Information Gathering:** Identify information needed to clarify a situation, seeking that information from appropriate sources. (Safety First, Cultivate Excellence, Lead Climate Action, Advance Equity and Livability in all Communities - Equity, Innovation, Integrity)

TYPICAL DUTIES:

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

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

35%	E	Report and provide assistance to the Chief, Fleet Management Program Branch, in planning, development, and administration of California's intercity passenger rail rolling stock Fleet Management Plan. Identify equipment needs in the long- and short-term future, and coordinating meetings with maintenance process stakeholders to discuss vehicle statuses and upcoming opportunities for maintenance. Present fleet planning information to internal and external stakeholder groups, including junior management at Joint Power Authorities (JPAs). Supports the development of new processes and contracts to efficiently and effectively maintain state-owned rail vehicles, monitor usage of leased vehicles, modernize vehicles, and plan the procurement of new vehicles to provide passenger rail service as planned in the Zero-Emission Strategy for Intercity Passenger Rail and the State Rail Plan. Lead small project teams to advance Fleet Management goals and initiatives.
25%	E	Work with subject matter experts (SMEs) on consultant teams or at JPAs to support reviews of existing maintenance techniques and practices and develop new maintenance paradigms in line with current industry standards. Assist in the review of potential technologies and tools that may drive a higher level of rolling stock reliability, optimize maintenance programs, lower cost, and maintain the highest possible level of safety. Support other efforts within DOR to secure rail equipment either through procurement or lease. Lead targeted project teams developing fleet planning and maintenance planning documents.
15%	E	Support the Chief, Fleet Management Program Branch as needed in the development of reports, budgetary documents, information packages, and presentations to internal or external stakeholders about the status of state equipment assets and efforts.
15%	E	Support the Chief, Fleet Management Program Branch as needed in the development of grant application packages and contract procurement packages in support of State equipment assets and efforts.
5%	M	Track information and issues related to the railcar fleet from multiple different information sources. Collect and compile such data as is available about the railcar fleet and identify methods to improve data collection, analysis, and publication.
5%	M	Assist with the development of interagency working groups, such as the Rail Fleet Consortium or other events for public rail agencies to gather, learn about emerging railcar fleet trends, and share information and best practices around rolling stock procurement, operation, maintenance, and fleet 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

None.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of the principles and practices associated with the planning and development of passenger rail services and strong project management, procurement experience, and contract expertise. The ability to effectively communicate the principles and practices of procurement and service contract administration in order to provide effective support and assistance to staff and executives in management of a wide variety of rail equipment, operations and planning related contracts and agreements.

Knowledge and understanding of: rail transportation planning and programs and more generally; federal and state multi-modal planning requirements and practices; transportation; air quality, land use, and environmental planning principles and practices; transportation plan, program and project financing mechanisms; and contemporary transportation land use, social, economic, environmental, financial, technical, legal, and political issues – especially in regard to rail.

The ability to work cooperatively and speak knowledgeably with representatives of other Caltrans divisions, other State and Federal governmental agencies, Amtrak, JPAs, rail equipment manufacturers, freight railroads, legislative staff, FRA, and individual citizens. The ability to speak effectively before groups and present a good image of the Division and the Department in any situation.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for ensuring that rules, guidelines and policies relating to contracts, capital programs and projects are known by managers and staff, and are complied with. They must ensure that the DOR projects are implemented in compliance with such policies.

Decisions must be consistent with Departmental policy and the authority vested in the position. Failure to ensure compliance with policies, granted authority and Department plans and processes could result in State funds being expended without the accrual

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)

of the required benefits to the State. Contracts that are not developed and managed properly could result in additional unknown costs to the State through claims and legal actions, project delays, loss of funding and equipment failures. Failure to keep projects moving through the project development and delivery process could result in unacceptable gaps in passenger rail services, inhibit the DOR from securing project funding, and subject the Department to criticism and unflattering comments.

PUBLIC AND INTERNAL CONTACTS

The incumbent has contacts with others in the Department, and other state agencies, other state DOTs, Federal agencies, cities, counties, consultants, railroads, equipment manufacturers and the general public.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Develop and maintain cooperative working relationships. Ensure employees are treated in a fair and equitable manner. Have the ability to multi-task, adapt to changes in priorities and complete tasks or projects with short notice. Develop new insights into situations and apply innovative solutions to make organizational improvements. Formulate effective strategies Consistent with the Departments vision and goals. Create and sustain an organizational culture that encourages others to provide the quality of service essential to high performance.

WORK ENVIRONMENT

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.

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