

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Sr Transportation Planner	OFFICE/BRANCH/SECTION District 5/Planning/Advance Planning	
WORKING TITLE Advance Planning Manager	POSITION NUMBER 905-800-4724-922	REVISION DATE 11/03/2025

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

GENERAL STATEMENT:

In District 5 Advance Planning, the Senior Transportation Planner works under the direction the Office Chief of Local Assistance and Environmental Stewardship, a Supervising Transportation Engineer. The incumbent works independently on the more complex transportation planning tasks, products, projects, and programs. This work is subject to a variety of federal and state regulations; in cooperation/partnership with federal, state, and local agencies as well as the general public.

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.

- Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Equity - Pride, Stewardship)
- Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Equity - Innovation)
- 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. (Equity - 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. (Equity, Prosperity - Collaboration)
- Teamwork/Partnership**: Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Equity - Collaboration, People First)
- 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 - 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. (Equity - Collaboration, People First)
- Analytical Skills**: Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Equity - Integrity)
- Computer literacy and application**: Appropriate knowledge of computer applications and other tools necessary to successfully perform tasks. (Equity - Innovation, Stewardship)

TYPICAL DUTIES:

Percentage Essential (E)/Marginal (M) ¹	Job Description
40% E	Responsible for the oversight of staff that are responsible for the preparation of Feasibility Studies and PIDs (SHOPP & Non-SHOPP) to ensure successful management and delivery of the 40.50 PID Program. 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.
20% E	Review PSR's for completeness and consistency with the Project Development Procedure Manual, Highway Design Manual and System Planning Documents.

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POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

20%	E	Responsible for staff oversight of the District 5 CAPTI & CSIS evaluation activities for State and Federal funding programs. Oversight and coordination internally and externally on 3-year and 10-year workplans for Non-SHOPP Project Initiation Documents and CAPTI alignment efforts with our regional partners.
10%	E	Provide Asset Management Tool (AMT) support by coordinating with Project Managers, Asset Manager, District Planning, and HQ Planning.
10%	M	Coordinate, schedule, and organize the SHOPP and non-SHOPP monthly meetings and record all PID documents.

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. The incumbent may act in a lead capacity to coordinate the resolution of multiple projects and tasks.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Incumbent must possess the interpersonal skills and temperament to work with a wide cross section of local agency staff, elected officials, and the general public. The incumbent must also have basic knowledge of land use principles, general plan development, and 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 teams composed of Caltrans' staff and consultants. Must have a working knowledge of Microsoft Office software such as Word, Excel, Powerpoint.

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 affect funding and the capital program.

PUBLIC AND INTERNAL CONTACTS

The position requires regular contact with assorted District and Headquarters staff in various functional areas, in addition to local agency staff, decision makers, and consultants. The incumbent will be called upon to assist in coordinating and communicating with various Federal, State, and local agencies, community-based organizations and the general public. May be required to report on contacts and tentative schedules for public meetings, public hearings, and individual meetings with these entities.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent may be required to work under stressful situations, both inside and outside the office setting and must have ability to encourage others to perform. Must have the ability to interact with many people, often in highly intense and emotionally charged situations while maintaining a calm and diplomatic attitude. The incumbent, in all interactions, is expected to treat others with respect, honesty, and fairness. The incumbent is expected to be somewhat flexible with assignments and duties as the workload changes. Must be able to focus, concentrate, and maintain intensity for long periods of time. Must deal effectively with pressure and have ability to multi-task, adapt to changes in priorities and complete tasks or projects with short notice or meet strict deadlines. Must be open to change and new information; adapt behavior and work methods in response to new information, changing conditions or unexpected obstacles.

WORK ENVIRONMENT

Employee will primarily work in a climate-controlled building with modular furniture and under artificial lighting. Employee may also be required to travel. Travel to meetings may begin at 5:00 am and continue to 12:00 am, with an occasional overnight stay out of town. Some fieldwork may be required that will involve various terrain.

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.

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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
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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE
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