

POSITION DUTY STATEMENT

PM-0924 (REV 04/2021)

CLASSIFICATION TITLE Sr Transportation Planner	OFFICE/BRANCH/SECTION OTAT/Transit Grants & Planning Branch	
WORKING TITLE Branch Chief, Transit Grants & Planning	POSITION NUMBER 904-111-4724-003	EFFECTIVE DATE 11/07/2025

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 the direction of the Office Chief for Transit & Active Transportation (OTAT), the Senior Transportation Planner, as Branch Chief, is responsible for supervising, coordinating, and directing the work of transportation planners and associate transportation planners engaged in administering Federal Transit Administration (FTA) programs, successful planning, execution, and closeout of state and federally funded transit and rail projects, and general transit planning and coordination functions for the District. Administrative duties include the distribution of resources and workload, tracking expenditures, addressing personnel issues, staff development, and other related activities. The work requires strong leadership and strategic thinking skills, extensive and effective communication, partnership, and a deep commitment to the Department's strategic vision, mission, values, and goals on safety, equity, climate action, prosperity, and employee excellence.

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.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Cultivate Excellence - Engagement)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Advance Equity and Livability in all Communities - Equity)
- **Ethics and Integrity:** Demonstrated concern to be perceived as responsible, reliable, and trustworthy. Respects the confidentiality of information or concern shared by others. Honest and forthright. Conforms to accepted standards of conduct. (Cultivate Excellence - 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. (Advance Equity and Livability in all Communities - Equity)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Cultivate Excellence, Advance Equity and Livability in all Communities - Engagement, Integrity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **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 - Engagement)
- **Workforce Management:** Hires and retains appropriate staff. Conducts workforce and succession planning. Provides feedback on performance. Addresses employee issues in a timely manner. (Cultivate Excellence - Integrity)
- **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. (Cultivate Excellence - Pride)

TYPICAL DUTIES:

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

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45%	E	Supervise, direct, and manage the work of the District Transit Representatives performing the following tasks: 1) development, management, and delivery of transit and rail capital projects; 2) preparation of applications and allocation requests for State funds including all documents required for programming and California Transportation Commission allocations; 3) writing and administering Master Agreements and Program Supplements for rail and transit capital projects, and 4) administering and managing contracts with local agencies in support of rail and transit capital improvement projects.
15%	E	Maintain current knowledge of pertinent State and Federal policies, procedures, and regulations. Provide technical assistance to internal divisions and external partners, including transit operators.
10%	E	Supervise and manage the FTA Section 5311 program for the District through policy and procedural guidance, assign work, set priorities, review work, and control the quality of outputs.
10%	E	Perform administrative duties as required, i.e. training, approving timesheets, making new hires, developing and evaluating staff, developing budgets.
10%	E	Coordinate with and maintain effective working relations with public transit operators, transportation agencies, other District functions, and Headquarters divisions with whom we interface.
10%	M	Participate in and coordinate the review of planning studies and project delivery documents for incorporation of transit and rail modes, contribute to the Overall Work Program, and review the Regional Transportation Plans and Sustainable Communities Strategies.

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

Supervision of Transportation Planners and Associate Transportation Planners. The Branch Chief is responsible for establishing work priorities, managing work flow, utilizing staff, and coordinating Branch activities.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Incumbent must be knowledgeable of the Caltrans Mission, Vision, Goals, strategic objectives, programs, laws, regulations and policies of the State of California and federal government regarding various State and federal transportation funding programs. Must be able to communicate effectively and work cooperatively with staff from a variety of District and Headquarters Divisions, as well as with staff from public agencies. Must possess the ability to prepare clear and concise reports, make presentations, communicate effectively, both written and oral with all levels of staff, negotiate effectively, deal tactfully with all parties, make timely decisions, and prioritize critical programs. Must be able to perform effectively under strict time constraints and pressure. Incumbent must be familiar with Caltrans principles and practices of transportation planning, funding and project delivery, as well as maintenance and operation of transportation projects and facilities. Must also have knowledge of general principles of programming related to projects.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Errors in guidance, implementation, coordination, and carrying out state and federal law, regulations, and policies could have negative impacts on the Caltrans ability to help facilitate the funding and delivering of transit capital projects, resulting in impacts to the Department's credibility, delivery commitments and ability to provide a safe, reliable, sustainable and equitable transportation network. Failing to meet deadlines or use sound judgment in the execution of the duties of this position could also result in financial impacts to the Department and limit the effectiveness in the relationship between the Caltrans its stakeholders and partners. Such errors may reflect poorly on Caltrans, the District and the Division.

PUBLIC AND INTERNAL CONTACTS

The incumbent has extensive contact with transportation agencies at the local, state, and federal level, transit operators, and local jurisdictions. The incumbent also has daily contact with the staff and management of Caltrans District and headquarters programs. Facilitation of and attendance at various meetings with external partners and community members representing the Department is a critical element.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Review and preparation of documents may require being at a desk for extended periods of time. Mental requirements may include sustained periods of concentration for reading and analyzing. Emotional requirements may include the ability to develop and maintain cooperative working relationships in an interdisciplinary setting, responding appropriately under time constraints, pressure, or difficult situations.

ADA Notice

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WORK ENVIRONMENT

The incumbent will primarily work in a climate-controlled office or cubicle under artificial lighting, as well as under a telework agreement to be agreed upon by management. Extensive computer usage is required. A combination of virtual and regular travel is expected within and outside the District to attend meetings and other events in order to engage with partners and the public.

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