#### POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE OFFICE/BRANCH/SECTION		_
Associate Transportation Planner D12/Office of Transportation Planning/LDR, Climate C		LDR, Climate Change
WORKING TITLE	POSITION NUMBER	REVISION DATE
District Transit Planner	912-825-4721-006	10/27/2025

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

#### **GENERAL STATEMENT:**

Under the direction of a Senior Environmental Planner, the Associate Transportation Planner is the District Transit Planner and the primary HQ program contact at the District level. Incumbent administers legislatively- mandated programs and activities in connection with State financial grant assistance programs related to guideway and inter-modal facilities development; provides technical expertise on transportation related issues involving transit management assistance, public transit systems, private-for profit and private-non-profit transportation operations. The incumbent works to enhance and expand integrated multimodal transportation; support the administration of State Grant Programs that provide funding for operating assistance and capital improvement projects. Assist agencies with purchase of buses and rolling stock, support commuter and urban rail services and helps to implement demand-responsive services for the elderly, disabled and lower income. In addition, the incumbent will also support the District Local Development Review function by participating in review of local and regional land use developments to assess the project's impact on the State Highway System (SHS).

#### **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. (Employee Excellence Innovation)
- Decision Making: Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate
  decisions. (Employee Excellence Integrity)
- **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. (Employee Excellence 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 Innovation)
- **Teamwork and Collaboration:** Sets team structure. Organizes, leads, and facilitates team activities. Promotes team cooperation and encourages participation. Capable of cross functionality and working well with others on a team to achieve personal goals, team goals, and organizational goals. Takes responsibility for individual actions in order to achieve consistent results. (Equity Collaboration)
- **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. (Prosperity 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. (Employee Excellence Collaboration)
- 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. (Prosperity Stewardship)
- Thoroughness: Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Employee Excellence Integrity)

# **TYPICAL DUTIES:**

Percentage Essential (E)/Marginal (M)<sup>1</sup> Job Description

# **POSITION DUTY STATEMENT**

DOT PM	DOT PM-0924 (REV 01/2025)		
35%	E	State Transit Funding and Grants - Is the District staff lead for local rail and transit planning, programming, funding, agreement execution and monitoring; and activities in connection with State financial grant assistance programs, in particular those related to Public Transportation Account (PTA), State Transportation Improvement Program (STIP), and Transportation Development Act (TDA) fund oversight. Assists grant recipients in complying with all State-funded rail and transit project programming and requirements. Reviews State grant applications for accuracy and assists transit operators with timely submittal. Ensures all transit project amendments and fund reimbursement requests are processed efficiently. Tracks and files completed work and completes applicable reports in a timely manner. Plays a lead role in providing project information and assistance to the County Transportation Commission (CTC), District management and staff as requested.	
25%	E	Leads the work to enhance and expand integrated multimodal transportation strategies in the region and in District system plans; supports commuter and urban rail services; and helps to implement demand-responsive services for the elderly, disabled and lower income. Review, analyze, document and report unmet needs for District planning and project development purposes; and to report Transportation Development Act (TDA) performance audit results. Track completed work and complete applicable reports to Headquarters.	
15%	E	Regional Planning - Review and comment on the Southern California Association of Governments' (SCAG) Regional Transportation Plan-Sustainable Communities Strategies (RTP-SCS), Metropolitan Planning Organization (MPO) Overall Work Program (OWP), Transportation Improvement Programs, and State Implementation Plans, that satisfy federal and state air quality requirements. In coordination with Districts 7, 8, & 11, implements State and Federal legislation and policies; provides coordination with District programs, plans and projects all relating to development of the Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS); the Consolidated Planning Grant (CPG), Overall Work Program (OWP), and Regional and Statewide Air Quality Conformity and Greenhouse Gas (GHG/Climate Change) reduction strategies.	
10%	E	Local Development Review - Coordinates the District's California Environmental Quality Act (CEQA) intergovernmental review and comments on project environmental documents as proposed by private developers and public sector. Performs complex analysis of documents and coordinates comments with other functional unit experts. Reviews and comments on Caltrans projects, Project Reports, Encroachment Permit applications, etc. Works with local jurisdictions to identify and negotiate mitigation measures to address the direct and cumulative impacts of proposed development on the state highway system. Proactively works with local government agencies on General Plan and Community Plan updates. Promotes land use transportation coordination policies in the planning process.	
5%	E	As a District state and system plan support member, be familiar with the California Transportation Plan (CTP) purpose and development. Attend and provide briefings on the Orange County Transportation Authority (OCTA) Transit Committee meetings. Briefings will be provided to Office of Transportation Office Chief and Deputy District Director for Planning and Local Assistance on regional transit activities where appropriate and as directed. Work with the System Planning Team and communicate issues, risks, and status of local development issues to the Branch Chief, Office Chief of Transportation Planning, and Deputy District Director of Planning.	
5%	М	Researches and presents periodic updates of transportation related information that impacts transportation infrastructure development. This includes, local, regional, state, and national demographics, housing, social, environmental trends and guidance, and etc.	
5%	М	Other duties as required to support the office tasks and deliverables.	

<sup>1</sup>ESSENTIAL 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 Will not supervise but may act as a lead and provide technical expertise.

# POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

# KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS Knowledge of:

- State and Federal laws and regulations related to transportation planning
- The planning process and general practices of transportation planning
- Research methods and techniques including conducting or participating in planning studies, contemporary transportation, environmental, land use, social, economic, fiscal, legal and political issues
- Effective public participation techniques

#### Ability to:

- Evaluate general planning proposals, establish effective, cooperative working relationships with all transportation agencies, work independently and act as an interdisciplinary team member.
- Evaluate, prioritize and schedule workload to ensure timely completion
- · Gather, analyze and interpret data
- Develop formats to present and display data
- Communicate effectively both orally and in writing
- Prepare written reports in a timely manner
- · Work effectively with others as an interdisciplinary team member
- Establish and maintain cooperative relationships within the District and Department, and with the public and outside agencies
- Apply general techniques of insuring participation in the planning process
- · Coordinate transportation planning, research and analysis of proposed projects

#### Analytical Skill in:

- Performing increasingly responsible and varied assignments under direct supervision
- Understanding and applying those aspects of federal, state and local laws, regulations, policies, procedures and standards pertaining to the planning process
- · Interpreting maps, site and building plans and specifications, graphs and statistical data
- Researching, analyzing and summarizing planning data both manually and with basic computer programs
- Preparing clear visual displays, such as maps, graphs and illustrations
- Making clear and persuasive presentations of ideas; prepare clear, concise and complete technical documents, reports, correspondence and other written materials

#### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Errors in analysis and subsequent recommendations will result in the ineffective use of tax dollars, the loss of substantial time and funds, and potential loss of credibility of the Department.

#### PUBLIC AND INTERNAL CONTACTS

Incumbent in this position requires contact with staff of local government agencies, other units in the District, Headquarters staff, consultants, developers and various community-based organizations. May represent the Department regarding planning issues at public and agency meetings for projects regarding Climate Change Adaptation.

#### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Reviewing reports may require sitting for extended periods of time. Field work will require standing and/or walking for prolonged periods of time in all kinds of weather. Mental requirements may include sustained periods of concentration for reading and analyzing various documents. Emotional requirements may include the ability to develop and maintain cooperative working relationships in an interdisciplinary setting, responding appropriately to difficult situations, recognizing emotionally-charged situations and issues, and acknowledging various opinions.

# WORK ENVIRONMENT

The incumbent will telework and/or work in a climate controlled office or cubicle under artificial lighting. Extensive computer usage is required. Travel both within and outside the District may be required when attending meetings. Incumbent may also be exposed to a variety of hazardous and/or unpleasant field conditions, including wet, rainy, foggy, cold or hot weather. Travel, including overnight travel, may be required.

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

#### POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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.)

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)	
FMDLOVEE (Signature)	DATE
EMPLOYEE (Signature)	DATE
I have discussed the duties with, and provided a copy of this duty statement	to the employee named above.
SUPERVISOR (Print)	
Scott Shelley	
SUPERVISOR (Signature)	DATE

#### POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE OFFICE/BRANCH/SECTION		
Fransportation Planner D12/Office of Transportation Planning/LDR, Climate Cha		DR, Climate Change
WORKING TITLE	POSITION NUMBER	REVISION DATE
District Transit Planner	912-825-4768-	10/272025

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

#### **GENERAL STATEMENT:**

Under the supervision of a Senior Environmental Planner, the Transportation Planner is the District Transit Planner and will assist in delivering the District's Rail and Transit program activities. Incumbent assists in administering legislatively-mandated programs and activities in connection with State financial grant assistance programs related to guideway and inter-modal facilities development; provides technical expertise on transportation related issues involving transit management assistance, public transit systems, private-for profit and private-non-profit transportation operations. The incumbent assists in working to enhance and expand integrated multimodal transportation; support the administration of State Grant Programs that provide funding for operating assistance and capital improvement projects. Assist agencies with purchase of buses and rolling stock, support commuter and urban rail services and helps to implement demand-responsive services for the elderly, disabled and lower income. In addition, the incumbent will also assist in supporting the District Local Development Review function by participating in review of local and regional land use developments to assess the project's impact on the State Highway System (SHS).

#### **CORE COMPETENCIES:**

As a 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. (Employee Excellence Innovation)
- Decision Making: Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate
  decisions. (Employee Excellence Integrity)
- **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. (Employee Excellence 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 Innovation)
- **Teamwork and Collaboration:** Sets team structure. Organizes, leads, and facilitates team activities. Promotes team cooperation and encourages participation. Capable of cross functionality and working well with others on a team to achieve personal goals, team goals, and organizational goals. Takes responsibility for individual actions in order to achieve consistent results. (Equity Collaboration)
- **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. (Prosperity 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. (Employee Excellence Collaboration)
- 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. (Employee Excellence Integrity)
- Thoroughness: Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Employee Excellence Integrity)

# **TYPICAL DUTIES:**

Percentage Essential (E)/Marginal (M)<sup>1</sup> Job Description

# POSITION DUTY STATEMENT

35%	Е	State Transit Funding and Grants - Assists with local rail and transit planning, programming, funding,
		agreement execution and monitoring; and activities in connection with State financial grant assistance programs, in particular those related to Public Transportation Account (PTA), State Transportation Improvement Program (STIP), and Transportation Development Act (TDA) fund oversight. Assists grant recipients in complying with all State-funded rail and transit project programming and requirements. Assists in reviews of State grant applications for accuracy and assists transit operators with timely submittal. Assists in ensuring all transit project amendments and fund reimbursement requests are processed efficiently. Tracks and files completed work and completes applicable reports in a timely manner. Assist in providing project information and assistance to the District management and staff as requested.
25%	Е	Works to enhance and expand integrated multimodal transportation strategies in the region and in District system plans; supports commuter and urban rail services; and helps to implement demand-responsive services for the elderly, disabled and lower income. Review, analyze, document and report unmet needs for District planning and project development purposes; and to report Transportation Development Act (TDA) performance audit results. Track completed work and complete applicable reports to Headquarters.
15%	E	Regional Planning - Review and comment on the Southern California Association of Governments' (SCAG) Regional Transportation Plan-Sustainable Communities Strategies (RTP-SCS), Metropolitan Planning Organization (MPO) Overall Work Program (OWP), Transportation Improvement Programs, and State Implementation Plans, that satisfy federal and state air quality requirements. In coordination with Districts 7, 8, and 11, assists in implementing State and Federal legislation and policies; provides coordination with District programs, plans and projects all relating to development of the Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS); the Consolidated Planning Grant (CPG), Overall Work Program (OWP), and Regional and Statewide Air Quality Conformity and Greenhouse Gas (GHG/Climate Change) reduction strategies.
10%	Е	Local Development Review - Assists in the coordination of the District's California Environmental Quality Act (CEQA) intergovernmental review and comments on project environmental documents as proposed by private developers and public sector. Performs complex analysis of documents and coordinates comments with other functional unit experts. Reviews and comments on Caltrans projects, Project Reports, Encroachment Permit applications, etc. Works with local jurisdictions to identify and negotiate mitigation measures to address the direct and cumulative impacts of proposed development on the state highway system. Proactively works with local government agencies on General Plan and Community Plan updates. Promotes land use transportation coordination policies in the planning process.
5%	E	As a District state and system plan support member, be familiar with the California Transportation Plan (CTP) purpose and development. Attend and provide briefings on the Orange County Transportation Authority (OCTA) Transit Committee meetings. Briefings will be provided to Office of Transportation Office Chief and Deputy District Director for Planning and Local Assistance on regional transit activities where appropriate and as directed. Work with the System Planning Team and communicate issues, risks, and status of local development issues to the Branch Chief, Office Chief of Transportation Planning, and Deputy District Director of Planning.
5%	M	Researches and presents periodic updates of transportation related information that impacts transportation infrastructure development. This includes, local, regional, state, and national demographics, housing, social, environmental trends and guidance, and etc.
5%	М	Other duties as required to support the office tasks and deliverables.

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS Will not supervise.

<sup>1</sup>ESSENTIAL 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.

# POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

# KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of:

- State and Federal laws and regulations related to transportation planning
- The planning process and general practices of transportation planning
- Research methods and techniques including conducting or participating in planning studies, contemporary transportation, environmental, land use, social, economic, fiscal, legal and political issues
- · Effective public participation techniques

#### Ability to:

- Evaluate general planning proposals, establish effective, cooperative working relationships with all transportation agencies, work independently and act as an interdisciplinary team member.
- Evaluate, prioritize and schedule workload to ensure timely completion
- Gather, analyze and interpret data
- Develop formats to present and display data
- Communicate effectively both orally and in writing
- Prepare written reports in a timely manner
- · Work effectively with others as an interdisciplinary team member
- Establish and maintain cooperative relationships within the District and Department, and with the public and outside agencies
- Apply general techniques of insuring participation in the planning process
- Coordinate transportation planning, research and analysis of proposed projects

# Analytical Skill in:

- Performing increasingly responsible and varied assignments under direct supervision
- Understanding and applying those aspects of federal, state and local laws, regulations, policies, procedures and standards pertaining to the planning process
- Interpreting maps, site and building plans and specifications, graphs and statistical data
- Researching, analyzing and summarizing planning data both manually and with basic computer programs
- · Preparing clear visual displays, such as maps, graphs and illustrations
- Making clear and persuasive presentations of ideas; prepare clear, concise and complete technical documents, reports, correspondence and other written materials

#### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Errors in analysis and subsequent recommendations will result in the ineffective use of tax dollars, the loss of substantial time and funds, and potential loss of credibility of the Department.

#### PUBLIC AND INTERNAL CONTACTS

Incumbent in this position requires contact with staff of local government agencies, other units in the District, Headquarters staff, consultants, developers and various community-based organizations. May represent the Department regarding planning issues at public and agency meetings for projects regarding Climate Change Adaptation.

#### PHYSICAL. MENTAL. AND EMOTIONAL REQUIREMENTS

Reviewing reports may require sitting for extended periods of time. Field work will require standing and/or walking for prolonged periods of time in all kinds of weather. Mental requirements may include sustained periods of concentration for reading and analyzing various documents. Emotional requirements may include the ability to develop and maintain cooperative working relationships in an interdisciplinary setting, responding appropriately to difficult situations, recognizing emotionally-charged situations and issues, and acknowledging various opinions.

### WORK ENVIRONMENT

The incumbent will telework and/or work in a climate controlled office or cubicle under artificial lighting. Extensive computer usage is required. Travel both within and outside the District may be required when attending meetings. Incumbent may also be exposed to a variety of hazardous and/or unpleasant field conditions, including wet, rainy, foggy, cold or hot weather. Travel, including overnight travel, may be required.

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

# POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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)	
	T= -==
EMPLOYEE (Signature)	DATE
I have discussed the duties with, and provided a copy of this duty stat	ement to the employee named above.
SUPERVISOR (Print)	
Scott Shelley	
SUPERVISOR (Signature)	DATE