

CLASSIFICATION TITLE Associate Environmental Planner, AH	OFFICE/BRANCH/SECTION 08/Environmental Planning/Cultural Studies	
WORKING TITLE Associate Environmental Planner, AH	POSITION NUMBER 908-105-4642-006	REVISION DATE 09/11/2025

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

GENERAL STATEMENT:

As a participating interdisciplinary team member, under the general direction of a Senior Environmental Planner, the incumbent is responsible for architectural and historical studies and project effects analysis for transportation projects pursuant to Section 106 of the National Historic Preservation Act and other applicable state and federal regulations. The incumbent identifies and evaluates architectural or other historic built resources as part of the transportation project development process; prepares written analyses of such resources as an aid in the development of modal and design alternatives for transportation projects; identifies and analyzes impacts of transportation projects on historical values and their interrelationships to other cultural resources; develops and recommends mitigation measures to avoid or minimize identified impacts upon these resources. Will act as lead over special projects and may provide guidance to less experienced staff.

CORE COMPETENCIES:

As an Associate Environmental Planner, AH, 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. (Employee Excellence - Innovation, Stewardship)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - Equity, Pride)
- **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 - Collaboration, Equity)
- **Conflict Management:** Recognizes differences in opinions and encourages open discussion. Uses appropriate interpersonal styles. Finds agreement on issues as appropriate. Deals effectively with others in conflict situation. (Employee Excellence - Collaboration, Equity)
- **Interpersonal Savvy/Partnering:** Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Equity, Employee Excellence - Collaboration, Equity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Equity, Climate Action, Employee Excellence - Collaboration, Innovation, Integrity)
- **Interpersonal Effectiveness :** Effectively and appropriately interacts and communicates with others to build positive, constructive, professional relationships. Tailors communication style based on the audience. Provides and is receptive to feedback. (Equity, Employee Excellence - Collaboration, Equity, Integrity)
- **Forward Thinking:** Anticipates the implications and consequences of situations and takes appropriate actions to be prepared for possible contingencies. Anticipates and prepares for future developments. (Safety, Climate Action, Employee Excellence - Equity, Innovation, Integrity, Pride)
- **Commitment/Results Oriented:** Dedicated to public service and strives for excellence and customer satisfaction. Ensures results in their organization. (Employee Excellence - Collaboration, Integrity)

TYPICAL DUTIES:

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

POSITION DUTY STATEMENT

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40%	E	Conducts field surveys and prepares written technical reports (Historic Property Survey Reports, Historic Resource Compliance Reports, Historic Resource Evaluation Reports, DPR 523 forms, and historical contexts) on historic architectural resources and historic resources that lie within the area of potential effects of transportation projects. Such reports evaluate the potential significance of the resource, and require familiarity with, and use of, historic architectural or engineering technical terminology and working knowledge of and familiarity with historical theory and methods. These written reports are incorporated into the Caltrans district-prepared comprehensive Historic Property Survey Reports or Historic Resource Compliance Reports which address cultural and historic properties, including archaeological sites, in the area of potential effects of transportation projects. Preparation of technical memos, screening memos, and other technical writing addressing historical, preservation, or cultural resource issues is an essential duty. Conducts in-depth, independent research in the fields of architectural history, engineering and technology history, California history, and other general aspects of American history and culture, in order to ensure that the studies undertaken adequately consider all possible historic and architectural resources within the proposed project's study area for their potential significance under the established criteria for the National Register of Historic Places and the California Register of Historical Resources. Such research is utilized to support historic architectural evaluations, findings, and conclusions reached in technical reports, and the related environmental document. Identifies and utilizes primary and secondary source materials in libraries, archives, historical societies, local government agencies, Caltrans, and other repositories. Interacts in the field, in research repositories, in the office, by telephone, and by letter with interested individuals and groups in the course of the above work. Conducts in-depth independent historical research for other assignments as needed, as directed by the Branch Chief. This may include, but not be limited to, research for initial assessments for potential site contamination or collaboration on historical archaeological analyses. Conducts analysis and prepares written technical reports (Finding of Effect Reports) about possible or anticipated project effects on historic built resources. Develops Memoranda of Agreements to memorialize mitigation commitments for the Department. Carries out mitigation responsibilities, including, but not limited to, Historic Structures Reports and Historic American Buildings Survey/Historic American Engineering Record (HABS/HAER) reports. Works with district engineering staff to ensure that historic properties adjacent to construction projects are protected.
35%	E	Peer-reviews Historic Property Survey Reports, Historic Resource Evaluation Reports, Finding of Effect reports, and related technical studies prepared by in-house staff, consultants, and local agencies for content, technical competence, comprehensiveness, and sound conclusions, in the areas of history and architectural history and regulatory compliance. Provides oversight direction for consultant work, and on occasion develops contracts. Reviews CEQA and NEPA environmental documents for consistency with technical studies. Develops fact sheets and provides advice, technical assistance and training on historical topics and architectural history preservation issues.
20%	E	Works with Caltrans district project development team staff as a cultural resources team member, providing technical historical expertise and information in order to develop location and design alternatives that avoid or minimize adverse effects on historic properties. These interactions require written, e-mail, telephone, and face-to-face communication. Attendance at meetings in the District Office may be required at least once per week for each project assigned to incumbent and for staff meetings, both formal and informal. Assists in staff-level liaison and discussions in the area of architectural history and/or history with State, Federal, and local agencies. These agencies include: California Office of Historic Preservation, Advisory Council on Historic Preservation, and Federal Highway Administration. These discussions will be conducted by phone, in the district office, and in the offices of these agencies.
5%	M	Photocopies and scans reports, directives, correspondence and plans for and loaned by other members of the project development team. Accesses, inputs and retrieves information from Caltrans and other state-maintained databases. Records field conditions and field work photographically. Makes photocopies or scans above reports for circulation to appropriate state and federal agencies. Transmits reports to these agencies. Files project reports and correspondence in the Environmental Planning files to maintain a complete and accurate record of project history and decision-making. Training: Incumbent may prepare, lead, and participate in training for other Caltrans cultural resource specialists or consultants, on occasion.

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. However, may be assigned by supervisor to act as lead worker.

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KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The Associate Environmental Planner/Architectural History must be able to analyze situations rapidly and accurately and propose effective courses of action for the work in coordination with the Branch Chief, Office Chief, district engineering staff, and outside agencies. The incumbent must meet the Minimum Qualifications for the position and possess broad knowledge of the principles and practices of architectural history and history as applied to the evaluation of historic period buildings, bridges, roads, landscapes and other built resources. Knowledge of California history and architectural history is strongly recommended.

Incumbent must apply sound judgment to the evaluation of the significance of historic buildings, bridges, roads, landscapes and sites for the National Register of Historic Places and as historical resources under CEQA. The incumbent's recommendations for potential National Register eligibility and Section 106 and CEQA effect determinations must be logical and defensible from possible challenges from preservation, community and environmental interest groups, with the resultant delays and increased costs such challenges can cause.

The Associate Environmental Planner/Architectural History must have the ability to prepare complex written documents and correspondence in a clear, concise and complete manner, using Standard English vocabulary, grammar, spelling, and punctuation. The incumbent will communicate effectively, presenting clear and persuasive ideas in an oral or written format.

The Associate Environmental Planner/Architectural History must also be able to utilize a computer for the extensive writing, and, on occasion, the database management that the job requires. The incumbent will prepare visual displays such as maps, graphics, and illustrations requiring graphic production skills, photography skills (35-mm and digital cameras).

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The Associate Environmental Planner/Architectural History will be responsible for the adequate and timely completion of cultural resource survey and evaluation technical reports to achieve project approval of the environmental document and tasks related to mitigation obligations. The incumbent's work may require decisions about development, sequencing, and prioritization of tasks, tasking work to others, and identifying any other functional unit dependencies. The consequences for error can include unanticipated project delay and project cost overruns.

PUBLIC AND INTERNAL CONTACTS

This position will require multiple contacts with a wide variety of interdisciplinary trained staff and persons both within Caltrans and from Federal Agencies, State Agencies, Regional Agencies, Local Governments, Military Administrative personnel, citizen groups and individuals. Occasional contacts with politicians, representatives or other groups or persons not listed here may also occur or be required. These contacts may involve written or verbal communications.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The work requires the physical ability to stand or sit for prolonged periods of time, normal or correctable vision and hearing, manual dexterity to bend, move, twist, stoop or reach, including typing ability. Occasional moving of equipment or packages (up to 30 pounds) may also be required. Mental requirements include the ability for sustained concentration and related activities needed for report analysis and writing, researching and sorting data and information, data and report filing, long term memory capabilities, problem solving and logical reasoning. Also required is the ability to adapt to constantly changing job and project related requirements. Emotional requirements include: the ability to develop and maintain cooperative working relationships, ability to accept and act on verbal directions, ability to recognize emotionally charged issues in verbal and written communications, ability to respond and maintain composure while dealing with difficult or emotional situations, maintain a positive attitude while working with others to solve problems. Ability to handle a high pressure environment and stressful pressures by managing conflict and confrontation.

WORK ENVIRONMENT

The work environment is normally conducted between the hours of 7:00 AM and 5:00 PM in a professional office atmosphere with florescent and/or incandescent lighting. Office temperatures are normally controlled heating and/or air conditioning set to accommodate the comfort level of the majority of the workers except when energy conservation measures may be required. Employee also will be required to travel and work out doors and may be exposed to winds, dirt, noise, uneven surfaces, and/or extreme heat or cold. Employee will be required to work in all climates (season) in the low and high desert and mountainous areas. During the summer months, the temperature could exceed 90 degrees Fahrenheit and as low as 50 degrees Fahrenheit on winter days. The work area includes urban and rural areas within San Bernardino and Riverside counties. Although most of the fieldwork would occur during spring and summer, the work is generally considered year round. Occasional public hearings and meetings in board or conference room atmospheres may involve working and travel before or after hours to attend these meetings and setup or take down displays and equipment. Travel may include use of state owned, rented or privately owned vehicles, and travel on commercial bus, rail or airlines. Occasional training or work related assignments may be offered or required which could require travel to the training or work site (location) and staying over night for limited periods of time (normally 1 to 3 working days but no more than 5 consecutive working days at any one time).

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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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