

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Associate Transportation Planner	District 11/ Division of Planning & Local Assistance	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Associate Transportation Planner - PID Support	911-820-4721-922	01/27/2025

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 the Branch Chief within the District 11 Division of Planning and Local Assistance, the incumbent is an interdisciplinary team member at full journey person level. Incumbent works independently to perform difficult and complex planning work to plan, develop, organize, and direct activities which integrate various social, economic, environmental, transportation, and land use factors to support implementation of a balanced, multimodal State transportation program. The incumbent leads in the development and implementation of Project Initiation Documents (PIDs) and associated workload reporting tools, data management practices and PID Program functions. The incumbent also assists in the development of the State Highway Operation Protection Program (SHOPP) 5-year plan and related activities. Some assignments may be given by the Office Chief (PPM), and may include assisting with other Transportation Planning efforts. This may include but not limited to, regional planning, multimodal system planning, community planning, state planning, freight planning, active transportation, health, climate change, air quality, program project planning, Native American consultation, modeling, geospatial data analysis, and economics.

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.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (Employee Excellence - Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Prosperity - Collaboration, 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)
- **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. (Employee Excellence - 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. (Employee Excellence - Collaboration)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - People First)
- **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 - Innovation)
- **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)¹ Job Description

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30%	E	Takes the lead in coordinating with district offices to gather, verify, and compile PIDs for present, and future fiscal years. Prepares Planning sections of PIDs and collaborates with District Asset Managers to include all assets that are assigned to each project. This includes compiling information related to each project, inserting the information into the PID, and writing cohesive sections of the report that will ultimately be submitted for signature and subsequent project delivery. Coordinate the sections of the PIDs written, with the Program Project Management PID Unit Engineers, who are preparing the entire report.
25%	E	Develops and analyzes legislation related to transportation; proposes, performs, and evaluates transportation planning research; monitors, manages, and certifies the regional transportation planning process for conformance with State and Federal requirements; provides Transportation Planning expertise to Federal, State, regional, local agencies, and transit operators to carry out the transportation planning process. Promotes and supports alternative modes of transportation including active transportation, public transportation, and ride and bike sharing; and transportation demand management.
20%	E	Independently develops, administers, monitors, and manages consultant contracts and State and Federal Grant Programs. Works with contractors and grant recipients, monthly and annually, to ensure scope of work is being performed and proper use of funds are being utilized. Provides support to District Planning and Local Assistance Asset Management units for the development and fulfillment of Planning and Local Assistance Division Asset Management responsibilities. Collaborates in the SHOPP Asset Management which includes development and tracking functions.
15%	E	Acts as liaison to district and headquarters coordinators by providing statewide guidance, technical assistance, and training for Transportation Planning subject matters. Serves as a functional reviewer and consults with districts on issues and projects by utilizing phone, email, or in person contact.
10%	M	Prepares PID Program correspondence, issue memos, fact sheets, data analysis and other written material as required. Participates as a departmental representative on transportation planning issues at inter-or intradepartmental meetings and public or private meetings and hearings.

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

This not a supervisory position however the incumbent may act in a lead role.
Supervision is received from the Branch Chief, but may be received from the Office Chief as well. Additional assignments may be generated by requests from the Department's management, Districts, or other HQ units.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

This position requires the incumbent to understand and be able to articulate, both verbally and in writing, research and analysis methods, and their conclusions. The incumbent should have an understanding of and be able to communicate 1) principles, process, procedural practices and legal requirements of transportation planning and programming, 2) principles of project development and traffic operation applications 3) legislative processes, 4) roles and responsibilities of the Federal, State and Regional governments in providing transportation planning services, and 5) current departmental policies and programs. The incumbent must have the ability to accurately compile, analyze, interpret, and summarize data and to apply analytical techniques to recommend creative solutions to address transportation problems using spreadsheet, word processing, and relational database applications. The incumbent must be able to produce completed staff work and communicate effectively both verbally and in writing. The incumbent must possess the ability to effectively prepare and deliver presentations using a variety of media including but not limited to computer presentation software, paper flip charts, white boards, and strip maps. The incumbent must effectively work individually or as an interdisciplinary team member.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Recommendations and actions made by this position may impact the Departments' overall Planning program and relationships with our regional and local agency and government partners. Actions regarding the Department's programs could result in the inefficient use of state funding, delay of project delivery, and ineffective transportation planning.

PUBLIC AND INTERNAL CONTACTS

The incumbent must work cooperatively and effectively with HQ functional divisions, District management and staff, external agencies, and may be required to make formal presentations or provide training at meetings or workshops.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to use a phone, computer, keyboard, and monitor for long periods of time in an office setting. Must be able to develop and maintain cooperative working relationships by demonstrating tactfulness and treating others with respect,

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make decisions in a fair and ethical manner, and demonstrate a sense of responsibility and commitment to public service. Must be open to change and new information, adopting new work methods in response to changing conditions or unexpected obstacles, and have the ability to multi-task and complete tasks accurately within deadlines and with short notice.

WORK ENVIRONMENT

Work is accomplished in a variety of settings. While at the base of operation, the incumbent works in a typical florescent-lighted, climate-controlled, office environment in a multi-story state office building. The incumbent must operate usual office equipment. On occasion, the incumbent may need to travel to other locations to attend meetings, make presentations, etc., in different offices, conference and convention facilities, and the like. Possession of a valid driver's license is required to operate a State owned or leased vehicle.

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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CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION District 11/ Division of Planning & Local Assistance	
WORKING TITLE Transportation Planner - PID Support	POSITION NUMBER 911-820-4768-xxx	REVISION DATE 01/27/2025

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GENERAL STATEMENT:

Under the direction of the Branch Chief within the District 11 Division of Planning and Local Assistance, the incumbent is an interdisciplinary team member. Incumbent works under Branch Chief direction to perform less complex planning work to plan, develop, organize activities which integrate various social, economic, environmental, transportation, and land use factors to support implementation of a balanced, multimodal State transportation program. The incumbent may assist in developing Project Initiation Documents (PIDs) and associated workload reporting tools, data management practices and PID Program functions. The incumbent also assists in the development of the State Highway Operation Protection Program (SHOPP) 5-year plan and related activities. Some assignments may be given by the Office Chief and may include assisting with other Transportation Planning efforts. This may include but not limited to, regional planning, multimodal system planning, community planning, state planning, freight planning, active transportation, health, climate change, air quality, program project planning, Native American consultation, modeling, geospatial data analysis, and economics.

CORE COMPETENCIES:

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25%	E	Assists with developing and analyzing legislation related to transportation; proposes, performs, and assists evaluating transportation planning research; assist with the process to monitor, manage, and certify the regional transportation planning process for conformance with State and Federal requirements; assists to provide Transportation Planning expertise to Federal, State, regional, local agencies, and transit operators to carry out the transportation planning process. Promotes and supports alternative modes of transportation including active transportation, public transportation, and ride and bike sharing, and transportation demand management.
20%	E	Assists to develop, administer, monitor, and manage consultant contracts and State and Federal Grant Programs. Assists working with contractors and grant recipients, monthly and annually, to ensure scope of work is being performed and proper use of funds are being utilized. Assists to provide support to District Planning and Local Assistance Asset Management units for the development and fulfillment of Planning and Local Assistance Division Asset Management responsibilities. Assists in the SHOPP Asset Management which includes development and tracking functions.
15%	E	Assists as liaison to district and headquarters coordinators by providing statewide guidance, technical assistance, and training for Transportation Planning subject matters. May also assist in the functional review of Transportation Planning related issues and projects. Duties may be conducted by phone, email, or in person.
10%	M	The incumbent assists in preparing PID Program correspondence, issue memos, fact sheets, data analysis and other written material as required. Participates as a departmental representative on transportation planning issues at inter-or intradepartmental meetings and public or private meetings and hearings.

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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

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

SUPERVISOR (Print)

SUPERVISOR (Signature)

DATE