

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Associate Environmental Planner, AH	OFFICE/BRANCH/SECTION D10 Environmental	
WORKING TITLE Associate Environmental Planner, AH	POSITION NUMBER 910-156-4642-XXX	REVISION DATE

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

GENERAL STATEMENT:

Under the general direction of a Senior Environmental Scientist, the Associate Environmental Planner (Architectural Historian) identifies, inventories, and analyzes existing architectural resources and their values on transportation projects. Responsibilities may include leading a team in support of these activities.

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.

- **Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Employee Excellence - Innovation, People First)
- **Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety, Prosperity - Collaboration)
- **Continuous Professional Development**: Seeks to obtain knowledge and improve performance while supporting others in doing the same. (Equity, Climate Action - 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. (Employee Excellence - Integrity)
- **Teamwork/Partnership**: Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Equity, Prosperity - 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. (Climate Action - Innovation)
- **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, Prosperity - Collaboration, Equity)
- **Analytical Skills**: Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Innovation)
- **Technical Expertise**: Depth of knowledge and skill in a technical area. (Employee Excellence - Collaboration, Innovation, Integrity)

TYPICAL DUTIES:

Percentage Essential (E)/Marginal (M) ¹	Job Description
40% E	Review and perform technical analysis on historic architectural resources within the study area of transportation projects for compliance with state and federal laws. Reviews reports to evaluate the potential importance of culturally and historically significant properties. Evaluates historic architectural values and resources to aid in the development of modal and design alternatives for transportation projects. Identifies and analyzes impacts of transportation projects historic architectural values and their inter-relationships to other cultural resources. Review plans, specifications and estimates (PS&E) to ensure all environmental commitments are included or have been addressed. Conduct constructability reviews for projects in PS&E. Review and prepare non-standard specifications.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

30%	E	Provides guidance and participates in discussions on the development of measures to minimize the impact of transportation projects upon such resources in the area of architectural history with State, Federal, and local agencies. Develops and recommends mitigation measures to minimize identified impacts upon these resources. Prepares technical reports in support of environmental documents.
20%	E	Coordinates work with consultants and other contractors performing work for Caltrans in the area of historic architectural investigation. Reviews consultants' procedures, work progress and conclusions to ensure that the requirements of the appropriate environmental law(s) are met. Prepares and oversee task orders for consultant work.
10%	M	Implements project management techniques, tracking methods, and data input for assigned duties and projects. This includes the STEVE and CCRD databases.

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. May act as a lead person on an interdisciplinary team and perform routine oversight of consultants and student assistants.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of:

Principles and concepts of architectural history research techniques and methodologies
Principles of historic materials and construction techniques
State and Federal laws and regulations relating to environment
State, local and regional governmental organizations as they relate to environmental planning
History, architectural history and historic preservation
Trends in environmental, urban and regional planning
Trends in Federal, State and local environmental assessment and mitigation reports, impact statements, and/or negative declarations
General principles and techniques of research and statistical analysis
Methods and techniques of evaluation of environmental impacts
Various types of public facilities and how they service the community

Ability to:

Gather, organize, and analyze historical and architectural information
Prepare written reports that meet professional standards
Work effectively with others as an interdisciplinary team member
Conduct interviews for data gathering
Field review potential project locations
Survey buildings and structures as cultural resources
Evaluate the prospects for project impacts on significant historic architectural properties
Apply general techniques of insuring participation in the planning process
Coordinate environmental planning, research, and analysis of proposed projects
Make an assessment of an existing environment
Assist management in negotiations for environmental approval
Serve as a Principal Architectural Historian, Consultant Monitor, and Construction Monitor.
Establish and maintain cooperative relationships within the District and Caltrans, with the public, state and federal agencies, and historic preservation organizations

Analytical Skill:

Performing increasingly responsible and varied assignments under decreasing degrees of 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; preparing clear, concise and complete technical documents, reports, correspondence and other written materials

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The Associate Environmental Planner (Architectural History) independently makes decisions relative to the collection and analysis of data and report content. The incumbent makes recommendations regarding scope of study, level of detail, method of

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

impact analysis, impact evaluation factors, mitigation plans, and the commitment of branch resources. Failure to identify issues early and bring these to the attention of the supervisor can result in project delay or cost increases. Errors may delay project clearances or require that work be redone.

Incumbent is responsible for his/her actions, decisions, quality of work, and proper use of State time, equipment and materials. Improper performance of duties and/or failure to adhere to established policies, procedures and guidelines could lead to adverse action and possible termination.

PUBLIC AND INTERNAL CONTACTS

The incumbent will work closely with other Environmental staff, Project Managers and engineering staff to ensure timely project delivery. As required, the Incumbent will work with headquarters and other functional units, as well as staff from local, state and federal agencies. Some contact with the public may be required. In these and all interactions, it is expected that the Incumbent will represent Caltrans in a professional and cooperative manner.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

May be required to sit for long periods of time while using a computer. May be required to move large or cumbersome reports and/or equipment. While performing field reviews, employee may be required to work on uneven terrain, lift, carry, bend, kneel and stoop. The workload is subject to frequent, substantial, and unexpected changes. Must be able to organize, prioritize, concentrate for long periods of time, formulate effective strategies, multi-task, adapt to changes in priorities, and complete complex tasks or projects with short notice. Must quickly grasp new information and comprehend technical policy and procedural documents.

WORK ENVIRONMENT

Work will be done in a climate-controlled office under artificial lighting. While in the field, the Incumbent may be exposed to a variety of hazardous and/or unpleasant field conditions, including wet, rainy, cold or hot weather. Hard hat, safety vest or approved safety shirt, and eye protection must be worn at all times in the field. Occasional overtime, travel, and overnight stays may be required. A valid driver's license is desired.

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

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Environmental Planner, AH	OFFICE/BRANCH/SECTION D10 Environmental	
WORKING TITLE Environmental Planner, AH	POSITION NUMBER 910-156-4618-XXX	REVISION DATE

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 Scientist, the Environmental Planner (Arch/Hist) in learning capacity is responsible for identifying, inventorying, and evaluating architectural and engineering resources and their values in the context of statutory and regulatory compliance for transportation projects. As knowledge and skills are developed, Planner incumbent will perform the above tasks at a level of average difficulty. Duties include but are not limited to:

CORE COMPETENCIES:

As an 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.

- **Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Employee Excellence - Innovation, People First)
- **Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety, Prosperity - Collaboration, Stewardship)
- **Continuous Professional Development**: Seeks to obtain knowledge and improve performance while supporting others in doing the same. (Equity, Climate Action - 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. (Employee Excellence - Integrity)
- **Teamwork/Partnership**: Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Equity, Prosperity - 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. (Climate Action - Innovation)
- **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, Prosperity - Collaboration, Equity)
- **Analytical Skills**: Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Innovation)
- **Technical Expertise**: Depth of knowledge and skill in a technical area. (Employee Excellence - Collaboration, Innovation, Integrity)

TYPICAL DUTIES:

Percentage Essential (E)/Marginal (M) ¹	Job Description
40% E	Identify and record historic architectural resources that lie within the study area of transportation projects. Develop historic contexts to evaluate the potential significance of these properties Incumbent assists in the analysis of cultural resources that are architectural and engineering properties by completing DPR 523 forms and writing historic contexts Review plans, specifications and estimates (PS&E) to ensure all environmental commitments are included or have been addressed. Conduct constructability reviews for projects in PS&E. Review and prepare non-standard specifications.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

30%	E	Assists in the identification and evaluation of impacts of transportation projects upon historical resources and historic properties and the development of mitigation measures to minimize the identified effects to significant engineering and architectural properties Assists in developing measures to minimize the impact of transportation projects upon such historical resources and historic properties that are architectural or engineering in nature Serves as a liaison with Federal, local and other State agencies
20%	E	Provides support to the Associate Environmental planners who oversee the work of consultants or other contractors performing work for Caltrans in the area of historic architectural investigations Assists in the determination of the adequacy of Caltrans' compliance with existing statutes and regulations that apply to cultural resources
10%	M	Implements project management techniques, tracking methods, and data input for assigned duties and projects. This includes the STEVE and CCRD databases.

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

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of:

Principles and concepts of architectural history techniques and methodologies
History, Architectural History and Historic Preservation
State and Federal laws and regulations relating to environment
State, local and regional governmental organizations as they relate to environmental planning
Trends in environmental, urban and regional planning
Trends in Federal, State and local environmental assessment and mitigation reports, impact statements, and/or negative declarations.
General principles and techniques of research and statistical analysis
Methods and techniques of evaluation of environmental impacts
Various types of public facilities and how they service the community

Ability to:

Analyze environmental situations accurately
Gather and analyze data
Prepare written reports
Work effectively with others as an interdisciplinary team member
Conduct interviews for data gathering
Apply general techniques of insuring participation in the planning process
Coordinate environmental planning, research, and analysis of proposed projects
Make an assessment of an existing environment
Establish and maintain cooperative relationships within the District and Caltrans, and with the public and outside agencies

Analytical Skill in:

Performing increasingly responsible and varied assignments under decreasing degrees of 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; preparing clear, concise and complete technical documents, reports, correspondence and other written materials
Must be able to write clear correspondence

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The Environmental Planner (Architectural History) independently makes decisions relative to the collection and analysis of data and report content. The incumbent makes recommendations regarding scope of study, level of detail, method of impact analysis, impact evaluation factors, mitigation plans, and the commitment of branch resources. Failure to identify issues early and bring these to the attention of the supervisor can result in project delay or cost increases. Errors may delay project clearances or require that work be redone.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

Incumbent is responsible for his/her actions, decisions, quality of work, and proper use of State time, equipment and materials. Improper performance of duties and/or failure to adhere to established policies, procedures and guidelines could lead to adverse action and possible termination.

PUBLIC AND INTERNAL CONTACTS

The incumbent will work closely with other Environmental staff, Project Managers and engineering staff to ensure timely project delivery. As required, the Incumbent will work with headquarters and other functional units, as well as staff from local, state and federal agencies. Some contact with the public may be required. In these and all interactions, it is expected that the Incumbent will represent Caltrans in a professional and cooperative manner.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

May be required to sit for long periods of time while using a computer. May be required to move large or cumbersome reports and/or equipment. While performing field reviews, employee may be required to work on uneven terrain, lift, carry, bend, kneel and stoop. The workload is subject to frequent, substantial, and unexpected changes. Must be able to organize, prioritize, concentrate for long periods of time, formulate effective strategies, multi-task, adapt to changes in priorities, and complete complex tasks or projects with short notice. Must quickly grasp new information and comprehend technical policy and procedural documents.

WORK ENVIRONMENT

Work will be done in a climate-controlled office under artificial lighting. While in the field, the Incumbent may be exposed to a variety of hazardous and/or unpleasant field conditions, including wet, rainy, cold or hot weather. Hard hat, safety vest or approved safety shirt, and eye protection must be worn at all times in the field. Occasional overtime, travel, and overnight stays may be required. A valid driver's license is desired.

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