

**POSITION DUTY STATEMENT**

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Sr Transportation Planner	OFFICE/BRANCH/SECTION D4 Multimodal System Planning/Strategic Investment Planning	
WORKING TITLE Strategic Investment Planning Senior (Specialist)	POSITION NUMBER 904-121-4724-XXX	REVISION DATE 03/25/2026

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 the Office Chief, Multimodal System Planning, the incumbent is responsible for planning, organizing, and leading multimodal transportation investment planning activities in District 4. The incumbent would be responsible for managing federal, State, and other discretionary grant funding programs in collaboration with external agencies including the Metropolitan Transportation Commission (MTC) and the Bay Area County Transportation Agencies (CTA), and local jurisdictions as well as internal functional units in District 4, Headquarters and adjoining Caltrans districts. The incumbent would also be responsible for preparing discretionary grant funding applications for federal discretionary funding programs, California Senate Bill 1 - Road Repair and Accountability Act competitive programs, California Proposition 4 Climate Bond programs, and other State and local funding programs. These funding programs are often on an annual and biannual cycle and may require extensive early preparation and coordination prior to actual application deadlines as well as developing funding strategies in consultation with MTC, the CTAs and other internal and external stakeholders. Monitoring federal Notices of Funding Opportunities, participation in grant guidelines development led by the California Transportation Commission and other State agencies, and the identification and prioritization of relevant projects that align with grant funding criteria for current and future funding cycles are all critical functions of this position. In addition, the incumbent would be responsible for processing requests for letters of support, partnership letters, non-opposition letters, and letters of implementation associated with various funding programs. The incumbent would also be responsible for the review of locally-sponsored Project Initiation Documents (PID) for alignment with the Climate Action Plan for Transportation Infrastructure, as well as providing support in the nomination of State-sponsored non-SHOPP PIDs and feasibility studies. Knowledge of on-going planning efforts, Caltrans corridor planning process and products, project performance measures, and the project development process is strongly desired. Equity and climate change resiliency should also be considered in all aspects of this position with regard to improving safety, access, and mobility for Disadvantaged and Equity Priority Communities.

**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.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (Climate Action, Prosperity, Employee Excellence - Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - Integrity, Pride)
- **Continuous Professional Development:** Seeks to obtain knowledge and improve performance while supporting others in doing the same. (Employee Excellence - Integrity, People First, 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. (Employee Excellence - Collaboration, People First, Stewardship)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Equity, Climate Action, Employee Excellence - Collaboration, Equity, Stewardship)
- **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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Equity, People First, Pride, 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, Equity, Integrity)
- **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. (Safety, Equity, Climate Action, Prosperity - Innovation, Integrity, Pride)

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- **Technical Expertise:** Depth of knowledge and skill in a technical area. (Safety, Equity, Climate Action, Employee Excellence - Innovation, Integrity)

**TYPICAL DUTIES:**

Percentage	Essential (E)/Marginal (M) <sup>1</sup>	Job Description
40%	E	In collaboration with HQ Office of Strategic Investment Planning and other internal functional units as well as external partners, lead District Investment Planning activities related to the solicitation of nominations, project screening, evaluation and prioritization, and funding application development for various federal, and State, and local funding programs
20%	E	Actively solicit Caltrans letters of support and/or partnership, non-opposition letters, and letters of implementation. Provide technical support to external partners on submitting letter requests, and process the requests by their respective deadlines, including obtaining appropriate signatures.
15%	E	Prepare and coordinate reviews of comprehensive written memos evaluating proposed projects for Locally-Sponsored Project Initiation Documents (PID) to ensure alignment with the Climate Action Plan for Transportation Infrastructure (CAPTI). Provide internal and external guidance on CAPTI memo processes.
15%	E	Monitor changes in funding programs and program requirements. Update the funding opportunity tracking sheets on a regular basis for internal and external distribution. Maintain the Multimodal Investment Plan and district project priority lists for various funding programs.
5%	M	Research funding opportunities by project type in response to internal and external inquiries.
5%	M	Provide support in the nomination of State-Sponsored Non-SHOPP PIDs and Feasibility Studies.

<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**

This is a Senior Specialist position, thus does not require supervision of staff.

**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 and various phases of project development. 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 other 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 in stressful situations, make timely decisions, prioritize critical programs, and excel in negotiation. Must be able to perform effectively under strict time constraints and pressure. Should be familiar with modern technology and its application to the Department.

Incumbent must be familiar with Caltrans principles and practices of transportation planning, funding, asset management, project delivery, as well as maintenance and operations of transportation projects and facilities. Must also have knowledge of general principles of programming related to projects; innovative financing and current trends; and different project delivery methods. Possess general knowledge of investment planning, cost-benefit and statistical analysis. Ability to analyze and gather data; work effectively on an interdisciplinary team. Review and interpret federal NOFOs and other guidance and recommend appropriate courses of action based on given criteria. Develop technically-sound approaches and solutions in developing consensus among stakeholders.

**RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR**

Failing to meet deadlines could result in impacts to the Department's credibility and ability to fund and deliver projects according to schedule commitments. Errors in carrying out State and federal law, regulations, and policies could have negative impacts on the Department to fund and deliver transportation projects and ability to provide a safe, reliable, sustainable and equitable transportation network.

**PUBLIC AND INTERNAL CONTACTS**

Both internal and external coordination is required with stakeholders, both public and private. Facilitation of and attendance at various meetings representing the Department is key to open communication and collaboration with partners.

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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Reviewing reports and data may require sitting for extended periods of time. Field work may 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. Under a Permanent Telework Agreement with management, a combination of virtual and in-person meetings would be required.

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### WORK ENVIRONMENT

The employee 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. Employee may be required to make field visits throughout the District.

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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.

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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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