

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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| CLASSIFICATION TITLE Sr Transportation Planner | OFFICE/BRANCH/SECTION District 6 Planning | |
| WORKING TITLE Branch Chief | POSITION NUMBER 906-155-4724 | REVISION DATE 04/22/2026 |

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

GENERAL STATEMENT:

Under of the Office Chief, Multimodal Transportation Planning, the Senior Transportation Planner is responsible for leading a multi-disciplinary team and serves as the single point of contact with local and partner agencies. As a Branch Chief, this position is responsible for the development and management of long-range system and regional planning products, directing the analysis of impacts of local land use plans and amendments to the State Highway System, overseeing compliance with all federal and state transportation planning process requirements including Overall Work Programs, and acting as the Professional Development Liaison for the Office of Multimodal Transportation Planning.

The position requires extensive interaction with district and headquarters managers and carries the authority to reach consensus on short-, medium-, and long-range transportation system goals and objectives. It also involves negotiating and reaching agreement with local agencies regarding mitigation measures to protect the safety and operation of the State Highway System. The position is an active participant in the delivery of tiered priority Corridor Plans and other system and investment planning documents affecting the District.

The Senior Transportation Planner also manages branch activities and personnel matters related to organization, scheduling, training and staff development, performance evaluation, safety, and disciplinary actions. This position primarily supervises a staff of transportation planners but may also include administrative staff and student assistants.

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.

- **Change Leadership:** Develops new and innovative approaches needed to improve effectiveness and efficiency of work products. Encourages others to value change. Considers impact and recommends changes. (Equity, Employee Excellence - Equity, Innovation, People First)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety, Equity, Employee Excellence - Integrity, People First, Stewardship)
- **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 - Innovation, People First)
- **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. (Equity, Employee Excellence - Integrity, People First)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Equity, Prosperity, Employee Excellence - Collaboration, People First, Pride)
- **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. (Equity, Employee Excellence - People First, Pride)
- **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. (Equity, Employee Excellence - Collaboration, People First)
- **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 - Integrity, Pride)
- **Managing Performance:** Responsible for employee performance, setting clear goals and expectations, tracking progress against departmental and unit goals, providing feedback, and addressing performance issues promptly. (Safety, Equity, Employee Excellence - Integrity, People First, Pride)

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DOT PM-0924 (REV 01/2025)

TYPICAL DUTIES:

| Percentage | Essential (E)/Marginal (M) ¹ | Job Description |
|------------|---|--|
| 25% | E | <p>REGIONAL PLANNING</p> <p>Oversees the administration of regional planning activities, including but not limited to the collaboration in the development, review, and management of Regional Transportation Plans (RTPs), Sustainable Communities Strategies, and the Overall Work Plan (OWP). Develops partnerships with other agencies and the private sector to accomplish mutually agreeable and consistent plans and policies.</p> <p>Ensures that Metropolitan Planning Organizations' (MPOs) Regional Transportation Improvement Programs (RTIPs) meet federal air quality conformity requirements and are financially constrained. Ensures compliance of the Federal Transportation Improvement Program (FTIP) with federal planning and programming regulations in order to appropriately program projects into the FSTIP. Regularly attends and participates in MPO/RTPA Technical Advisory Committee (TAC) meetings. Oversees and negotiates, to reach consensus, with MPOs/RTPAs on which PSRs are to be delivered by Caltrans.</p> |
| 25% | E | <p>LOCAL DEVELOPMENT REVIEW</p> <p>Directs the review, analysis, and response to local land use proposals and amendments, consistent with CEQA and land use laws and policies. Coordinates and collaborates with various Caltrans functional units, including but not limited to Traffic Operations, Permits, Environmental, Project Management, and Right-of-Way, to identify and mitigate impacts to the State Highway System.</p> <p>Ensures that Caltrans' concerns, policies, and recommendations are effectively communicated, both verbally and in writing. Demonstrates the ability to recommend and negotiate appropriate mitigation measures that address safety and reduce Vehicle Miles Traveled (VMT) for both routine and complex local development proposals. Develops creative solutions for transportation financing and provides recommendations for entering into agreements to mitigate development impacts. Must demonstrate the ability to build strong relationships with internal and external partners.</p> |
| 25% | E | <p>SYSTEM AND INVESTMENT PLANNING</p> <p>Oversees and participates in activities related to the preparation of varying tiered Corridor Plans (including Comprehensive Multimodal Corridor Plans), and the District System Management Plan. Identifies and assigns special long-range system planning studies. Recommends candidate projects for Project Study Reports (PSRs) and develops basic project needs.</p> <p>Coordinates and facilitates the processing of Transportation Planning Scoping Information Sheets (TPSIS) in support of developing new Project Initiation Documents (PIDs). Prioritizes corridors for right-of-way preservation and ensures that system planning documents address Complete Streets and multimodal options for all users. Oversees investment planning activities that support the district investment strategy</p> |
| 20% | E | <p>SUSTAINABLE TRANSPORTATION PLANNING GRANTS</p> <p>Oversees the management of Competitive and Formula Sustainable Transportation Planning Grants. Responsibilities include supporting grant workshops, conducting extensive public outreach, scoring applications, and managing contracts throughout the lifecycle of each grant, through to the Grant Close-Out process.</p> <p>Identifies and seeks opportunities to pursue additional funding available through both federal and state competitive grant programs.</p> |

POSITION DUTY STATEMENT

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5% M PROFESSIONAL DEVELOPMENT

Acts as the conduit between Planning staff, management, and Headquarters' Division of Transportation Planning, Workforce Development Branch (WDB), for disseminating information related to training opportunities. Provides oversight, direction, and guidance for training courses, rotation announcements, recruitment opportunities, Basic and Field Planning Academy enrollment nominations, and WDB special projects.

Assists in identifying training needs for District Planning staff and facilitates the completion of periodic WDB training needs surveys. Attends and participates in annual and regular statewide seminars and meetings provided by WDB.

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

The Senior Transportation Planner directly supervises staff involved in regional transportation planning. The team may consist of Transportation Planners, Associate Transportation Planners, administrative staff, and student assistants.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of:

The Department's budgeting process

The Department's Affirmative Action Program objectives

Principles and techniques of effective supervision and personnel management

The supervisor's role in safety, health, labor relations, and the Department's Affirmative Action Program, including processes to meet these objectives

The Department's mission, organization, policies, and procedures

Federal and State laws and regulations, including the California Environmental Quality Act (CEQA) and the National Environmental Policy Act (NEPA) Concepts and terminology relating to transportation planning

The planning process and general practices of transportation planning, including methods of evaluating traffic impacts

Research methods and techniques, including conducting or participating in planning studies, and understanding contemporary transportation, environmental, land use, social, economic, fiscal, legal, and political issues

Effective public participation techniques

Ability to:

Work independently on complex planning projects

Organize and direct the work of staff engaged in a variety of planning activities

Communicate effectively with other agencies, the public, and the media

Effectively contribute to the Department's safety, health, labor relations, and Affirmative Action Program objectives

Conduct studies related to State transportation planning

Analyze problems, develop appropriate solutions, and recommend effective courses of action

Evaluate general planning proposals; gather, compile, analyze, and interpret data; and reason both logically and creatively

Develop effective formats to present and display data; present ideas clearly both orally and in writing

Work effectively as a member of an interdisciplinary team; establish and maintain cooperative working relationships with those contacted during the course of work

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The Senior Transportation Planner is responsible for exercising professional judgment in interpreting conclusions developed by engineers, planners, and related professionals. The incumbent must make decisions regarding scheduling and the effective use of staff and budget. Poor judgment, decisions, or recommendations could result in significant financial losses and/or compromise the Department's credibility.

PUBLIC AND INTERNAL CONTACTS

The Senior Transportation Planner has extensive contact with staff across the District, local agencies, consultants, elected officials, and the general public in the day-to-day operations of the branch. The incumbent represents the District in all phases of transportation planning and project delivery and provides support as needed. They must effectively represent the District to local, regional, state, and federal agencies, Headquarters functional managers, and other public and private sector stakeholders. Subject matter varies from simple to complex and may be controversial. Official commitments may sometimes be made. Contact is frequent and ongoing.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent may be required to sit for extended periods while using a keyboard and video display terminal. Occasionally, the position requires moving large or cumbersome reports from one location to another, along with occasional bending, stooping, and

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kneeling. The role requires the ability to manage project-related challenges calmly and productively, maintain focus, and effectively handle pressure. The incumbent must remain optimistic and persistent under stress or adversity and be able to develop and sustain cooperative working relationships.

WORK ENVIRONMENT

The incumbent will primarily work in a climate-controlled office environment under artificial lighting. Occasional travel within the District and statewide may be required to attend meetings with Caltrans staff, other agencies, and members of the public.

This position may be eligible for telework. 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 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)

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