

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION Office of Strategic Freight Planning
WORKING TITLE Associate Transportation Planner	POSITION NUMBER 900-074-4721-921
	REVISION DATE 05/07/2026

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

GENERAL STATEMENT:

Under direction of the Senior Transportation Planner, a Branch Chief, within the Office to the Strategic Freight Planning the Associate Transportation Planner leads in the development and updating of the State Freight Plan, implementation of the California Sustainable Freight Action Plan, the coordination of the freight outreach activities, and other actions supporting the Department's freight planning responsibilities. The incumbent serves as a liaison to assigned Caltrans District(s) and partner agencies within those Districts, an assigned freight mode, and/or focused topic area(s).

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.

- **Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Innovation, Integrity, Pride)
- **Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Innovation, Integrity, 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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Innovation, Integrity, 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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Innovation, Integrity, Pride)
- **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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Innovation, Integrity, 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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Innovation, Integrity, 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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Collaboration, Innovation, Integrity, Pride)
- **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, Employee Excellence - Collaboration, Innovation, Integrity, Pride)
- **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. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Innovation, Integrity, Pride)

TYPICAL DUTIES:

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

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30%	E	Leads in the development and updating of the State Freight Plan and/or implementation of the California Sustainable Freight Action Plan, consistent with the Federal and State Guidance, by researching and drafting a work plan to implement State agency actions, monitor pilot projects, develop illustrative graphics, and conducting analysis to inform Plan chapters or chapter subsections for modal, regional, and other related topics. Distill consultant reports and incorporate regional freight plan content. Collect and analyze data for inclusion in the plan via graphic representation. Review and edit draft plan content prepared by other staff. Revise draft plan chapters to respond to committee, stakeholder, and public comments. Incumbent may serve in a support and monitoring role and assist with outreach and technical assistance.
20%	E	Duties include, but not limited to, coordination and implementation of complex and interdisciplinary work plans; facilitating committee communications, meetings, and workshops; leading research projects and investigation panels. and coordinate websites updates. Additional duties may include the preparation of written reports and analyses for use by management and external customers, development of presentations, giving presentations to internal and external audiences, representing the Department on multi-agency committees that may also include advocacy groups and the freight industry, reviewing and commenting on freight-related legislation, and participating in research projects. The incumbent may serve in a lead capacity for oversight of consultant contracts.
20%	E	Leads in coordinating the Division's freight activities with other planning activities within Caltrans or within other agencies or private organizations as assigned. Such activities may include the State Rail Plan, and activities of the National Freight Advisory Committee, the State Freight Model, Marine Highways, Complete Streets, integrated corridor management, and others.
20%	E	Serves as modal and/or topical liaison by developing expertise relating to assigned freight mode(s) or topics. Responsible to gather freight modal-related data including identification of trends, trade flows and significant issues, and for preparing written analyses and policy recommendations. Responsible for developing and maintaining professional relationships with internal and external stakeholders associated with mode. May represent the Department on technical committees sponsored by Caltrans and others. The incumbent may represent the Office of Freight Planning on a variety of freight multidisciplinary, multimodal freight corridor, or related study groups and technical advisory committees. The incumbent will take the initiative and work directly with Division staff and management, other headquarters divisions, Districts, federal oversight agencies, partner agencies, advocacy groups, stakeholders, the public, and consultants.
10%	M	Serves as liaison to assigned Caltrans Districts. Duties include, but are not limited to reviewing and commenting on the freight related content of annual Overall Work Programs, Regional Transportation Plans, and other planning documents. Provide technical assistance to district planning staff. Prepare presentations, spreadsheets or other special assignments. Perform other tasks within the scope of the classification as assigned.

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 position does not supervise other employees but may serve in a lead capacity, directing activities of other staff for some assignments.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Basic knowledge of Federal and State laws and regulations related to transportation planning and programming, particularly those affecting freight transport.

Basic knowledge of Department guidelines and manuals, which provide the basis for carrying out planning activities and for programming and funding of improvements.

Basic knowledge of domestic and international freight movement trade trends and shipper/carrier needs, with specific emphasis on freight movement by ship, rail, and commercial vehicles.

Basic knowledge of the various elements that comprise the Department's planning program, including System and Regional planning, and how they relate to freight planning.

Basic knowledge of the interrelationship between the Department's planning program and other Caltrans program elements including Office of Truck Safety, Project Development, Programming, Research and Traffic Operations, etc.

Knowledge of the State/Department's contracting practices and quality concepts.

Knowledge of data analysis methods and techniques.

Knowledge of engagement and outreach methods and techniques.

Understanding of planning practices and principles.

Knowledge of planning laws and the intergovernmental framework for planning.

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Knowledge of the historical, current, and likely future influences shaping cities and regions, including design, land use, environmental, social, economic, financial, legal, and institutional dimensions.

Understanding of the concepts of completed staff work and ability to deliver completed staff work.

Knowledge of those physical, social, and political factors, including economic, environmental and fiscal issues, which may affect or be affected by Departmental policies and programs.

Ability to complete staff work in a professional, timely manner that meets quality and quantity requirements for Associate-level work.

Ability to create and maintain positive working relationships, and build consensus with internal and external contacts.

Ability to analyze issues, identify solution alternatives, determine potential impacts, and recommend course(s) of action.

Ability to prepare and present reports and analyses using word processing, spreadsheet, and presentation software.

The incumbent must be able to work closely with internal and external partners. Must be able to perform technical analyses, identify issues and suggest recommendations to address issues and must be able to complete assignments on time and accurately.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Decisions made by this position could impact Caltrans' policies and its programs. Failure to consider the political sensitivity or to fully evaluate the fiscal, economic, social and environmental impacts or technological constraints on Caltrans programs could result in delays in program delivery and subsequent losses of funding. Failure to complete analyses according to project scope and schedule could result in project or program delays and decreased credibility with the Legislature, the freight industry, and/or other agencies or customers.

PUBLIC AND INTERNAL CONTACTS

Considerable internal and external contact is required of this position, including occasional public presentations and working with elected officials.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employees may be required to sit for long periods of time using a keyboard and video display terminal.

WORK ENVIRONMENT

The incumbent works in front of a dual-monitor computer system under artificial light in an office setting with long periods of working in a sitting or standing position.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans current telework policy. While Caltrans supports telework, in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksite with minimal notification if an urgent need arises. The selected candidate may be required to conduct business travel on behalf of the Department or commute to the headquartered location. Business travel reimbursements considers an employee's designated Headquarters 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.

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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

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DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION Office of Strategic Freight Planning	
WORKING TITLE Transportation Planner	POSITION NUMBER 900-074-4768-921	REVISION DATE 05/13/2026

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

GENERAL STATEMENT:

Under supervision of the Branch Chief, a Senior Transportation Planner, the Transportation Planner, in a learner capacity, assists in the development and updating of the State Freight Plan, implementation of the California Sustainable Freight Action Plan, the coordination of the freight outreach activities, and other actions supporting the Department's freight planning responsibilities. The incumbent may serve as a liaison to assigned Caltrans District(s) and partner agencies within those Districts, an assigned freight mode, and/or focused topic area(s).

CORE COMPETENCIES:

As a 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.

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- **Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety, Employee Excellence - Collaboration, People First, 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. (Safety, Employee Excellence - Collaboration, People First, Pride)
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- **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. (Safety, Employee Excellence - People First, Pride)
- **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, Employee Excellence - People First, Pride, Stewardship)
- **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. (Safety, Equity, Employee Excellence - Collaboration, People First)

TYPICAL DUTIES:

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

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30%	E	Assists in the development and updating of the State Freight Plan and/or implementation of the California Sustainable Freight Action Plan, consistent with the Federal and State Guidance, by researching and drafting a work plan to implement State agency actions, monitor pilot projects, develop illustrative graphics, and conducting analysis to inform Plan chapters or chapter subsections for modal, regional, and other related topics. Distill consultant reports and incorporate regional freight plan content. Collect and analyze data for inclusion in the plan via graphic representation. Review and edit draft plan content prepared by other staff. Revise draft plan chapters to respond to committee, stakeholder, and public comments. Incumbent may serve in a support and monitoring role and assist with outreach and technical assistance. Assist in the oversight of consultant contracts.
20%	E	Duties include, but not limited to, assisting in the coordination and implementation of interdisciplinary work plans; facilitating committee communications, meetings, and workshops; assisting research projects and investigation panels; and coordinate websites updates.
20%	E	Assists in coordinating the Division's freight activities with other planning activities within Caltrans or within other agencies or private organizations as assigned, such activities may include the State Rail Plan, and activities of the National Freight Advisory Committee, the State Freight Model, Marine Highways, Complete Streets, integrated corridor management, and others.
15%		Serves as a modal liaison by assisting developing expertise relating to assigned freight mode(s) or topics. Responsible to gather freight modal-related data including identification of trends, trade flows and issues, and for preparing written analyses and policy recommendations. Responsible for developing and maintaining professional relationships with internal and external stakeholders associated with mode. May assist with representing the Department on technical committees sponsored by Caltrans and others.
10%		Assists in the administration of transportation performance measures that facilitate analysis and utilize existing project lists to identify, score, and prioritize projects for discretionary funding programs. These tasks involve working closely with, but not limited to, DOTP functional units, Caltrans Districts, Division of Data and Digital Services, the Director's Office, the Division of Rail, and the Senate Bill (SB 1) Program. The incumbent will support Freight grant applications for state & federal discretionary programs, help HQ Programs and Districts with submission materials, and ensure appropriate processing of project nominations.
5%		Perform other job-related duties within the scope of the classification as assigned.

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KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Basic knowledge of Federal and State laws and regulations related to transportation planning and programming, particularly those affecting freight transport.

Develop basic knowledge of domestic and international freight movement trade trends and shipper/carrier needs, with specific emphasis on freight movement by ship, rail, air and commercial vehicles.

Knowledge of the State's contracting practices and quality concepts.

Knowledge of data analysis methods and techniques.

Knowledge of engagement and outreach methods and techniques.

Understanding of planning practices and principles.

Knowledge of planning laws and the intergovernmental framework for planning.

Knowledge of the historical, current, and likely future influences shaping cities and regions, including design, land use, environmental, social, economic, financial, legal, and institutional dimensions.

Understanding of the concepts of completed staff work and ability to deliver completed staff work in a professional, timely manner that meets quality and quantity requirements for entry-level work.

Knowledge of physical, social, and political factors, including economic, environmental and fiscal issues, which may affect or be affected by policies and programs.

Ability to create and maintain positive working relationships, and build consensus with internal and external contacts.

Ability to analyze issues, identify solution alternatives, determine potential impacts, and recommend course(s) of action.

Ability to prepare and present reports and analyses using word processing, spreadsheet, and presentation software.

The incumbent must be able to work closely with internal and external partners. Must be able to assist with technical analyses,

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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