

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION Advance Planning	
WORKING TITLE State Highway Operation and Protection Plan - PID Coordinator	POSITION NUMBER 905-800-4721-XXX	REVISION DATE 05/05/2026

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 Advance Planning Management Branch Chief, the incumbent coordinates the District 5 State Highway Operation and Protection Plan (SHOPP) Project Initiation Document (PID) Program, providing guidance and technical support to staff and project teams for timely, high-quality development of PID documents. Responsibilities include maintaining accurate financial and program records, analyzing workload and resource data, preparing reports and forecasts, and contributing to process improvements and asset management activities. The role requires strong analytical, organizational, and communication skills, proficiency in spreadsheets, collaboration with internal and external partners, and may include supporting broader transportation planning functions as needed.

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.

- **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. (Employee Excellence - Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Prosperity - 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 - 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. (Equity - Collaboration, Integrity, People First, Pride)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Pride, Stewardship)
- **Diagnostic Information Gathering:** Identify information needed to clarify a situation, seeking that information from appropriate sources. (Employee Excellence - Innovation, Integrity, Pride)

TYPICAL DUTIES:

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

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50%	E	Independently coordinates and manages District 5 SHOPP and non-SHOPP Project Initiation Document (PID) development activities. Responsibilities include participating in Project Development Teams (PDTs), tracking schedules and milestones, monitoring resource needs, and ensuring the timely delivery of Project Study Reports (PSRs) and other PID documents. The incumbent supports program coordination by working closely with Project Managers, District Planning, Asset Management, and Headquarters. The role includes engaging early with local agencies and project sponsors to clarify project scope, identify issues, risks, and objectives, and ensure alignment with the Climate Action Plan for Transportation Infrastructure (CAPTI), California Transportation Plan (CTP) goals, and the Caltrans System Investment Strategy (CSIS). The incumbent participates in evaluating proposed projects and determining how nominations align with state goals, multimodal strategies, equity principles, and district priorities. The incumbent independently monitors and tracks PID-related expenditures using enterprise systems such as InfoAdvantage, AMSAdvantage, and the Asset Management Tool (AMT). Duties include compiling, validating, and analyzing financial and workload data; maintaining expenditure logs; performing reconciliations against district records; identifying discrepancies or expenditure trends; and preparing detailed financial, workload, and status reports to support forecasting, resource planning, and management decision-making. The incumbent helps track 40.50 PID program allocations and expenditures, ensuring compliance with fiscal policies, departmental procedures, documentation requirements, and PID program standards.
25%	E	Independently reviews PSRs and other PID documents for completeness, consistency, and compliance with departmental policy, the Project Development Procedures Manual, the Highway Design Manual, and CAPTI/CSIS alignment expectations. The incumbent identifies discrepancies, recommends corrective actions, and collaborates with functional units to resolve issues. Responsibilities include maintaining organized PID files, financial documentation, district PID databases, and audit-ready materials. The incumbent prepares compliance summaries, maintains document repositories and financial tracking tools, and responds to management inquiries regarding funding status, resource utilization, and documentation requirements. Duties also include contributing to the development of dashboards, summary reports, and improvements to documentation processes. The incumbent provides routine technical guidance to planning staff regarding PID documentation, financial procedures, early consultation records, and consistent recordkeeping practices.
15%	E	Independently prepares monthly and quarterly PID funding, workload, and status reports by gathering and validating data from district systems and compiling information into standardized formats for management and Headquarters Planning. The incumbent analyzes expenditure and workload trends, identifies process challenges and emerging issues, and prepares finance letters, issue memos, fact sheets, correspondence, and related program materials. The role includes providing technical support for the Asset Management Tool (AMT), including data entry, validation, troubleshooting, and report preparation. Additional duties include responding to stakeholder inquiries, coordinating monthly PID meetings, preparing agendas and meeting summaries, and recommending process improvements to enhance PID tracking, reporting accuracy, early consultation documentation, and workflow efficiency across both SHOPP and non-SHOPP activities.
10%	M	Provides analytical, organizational, and technical support for District 5 transportation planning activities and branch initiatives. Responsibilities include gathering and compiling planning data, supporting project documentation, preparing materials for outreach efforts, and updating district tracking tools. The incumbent assists in developing and maintaining district project lists, including contributions to the statewide Ten-Year Non-SHOPP Investment Plan and coordination with local agencies on the district three-year non-SHOPP PID workplan. Work is performed with moderate independence, and the incumbent identifies opportunities to improve planning processes, resource coordination, database accuracy, multimodal project development, and alignment with CAPTI, CSIS, and statewide transportation goals.

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 is not a supervisory position.

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 other District 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

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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, 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

Employees may be required to use a phone, computer, keyboard, and monitor for long periods of time in an office setting. The Division of Transportation Planning's core business hours are from 8:00 a.m. to 5:00 p.m., Monday through Friday, exclusive of any legal holidays or days of observance. The incumbent may be required to travel to work related events throughout the State as necessary.

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 headquarterd location as needed to meet operational needs. Business travel may be required, and reimbursement considers an employee's designated headquarterd location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to the headquarterd 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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WORKING TITLE State Highway Operation and Protection Plan - PID Coordinator	POSITION NUMBER 905-800-4768-XXX	REVISION DATE 05/05/2026

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GENERAL STATEMENT:

Under the supervision of the Advance Planning Management Branch Chief, the incumbent performs analytical and technical tasks within District 5's Advance Planning Branch, assisting in the coordination of State Highway Operation and Protection Plan (SHOPP) Project Initiation Documents (PIDs). Responsibilities include supporting the development and delivery of PID documents in line with Caltrans standards, maintaining organized financial and program records, compiling and summarizing workload and resource data, and helping to update tracking tools and improve processes. The role involves identifying basic data inconsistencies and process challenges, effective communication with staff and stakeholders, proficiency in spreadsheets, and providing general support for transportation planning and branch activities.

CORE COMPETENCIES:

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50%	E	Supports District 5 in organizing and tracking Project Initiation Document (PID) development for both the State Highway Operation and Protection Program (SHOPP) and the district's non-SHOPP PID program. Works with Project Managers, Planning staff, Asset Management, and Headquarters to monitor schedules, track progress, and help ensure timely delivery of Project Study Reports (PSRs) and other PID documents. Provides early consultation support for locally sponsored PIDs by helping project sponsors clarify project scope, document early issues, risks, goals, and constraints, and ensure alignment with the Climate Action Plan for Transportation Infrastructure (CAPTI), the California Transportation Plan (CTP), and the Caltrans System Investment Strategy (CSIS). Assists in evaluating proposed projects to determine how well they align with statewide goals and multimodal, equity-focused planning priorities. Primary tasks include tracking PID activities, updating schedules and databases, identifying basic resource needs, and assisting with resolving routine delivery issues. Helps track monthly expenditures for the 40.50 PID program and maintains summary logs to support district allocation management. Uses systems such as InfoAdvantage, AMSAdvantage, and the Asset Management Tool (AMT) to enter data, run reports, validate financial and workload information, maintain expenditure records, and prepare basic reports for forecasting, budgeting, and program planning. Ensures program files and documentation follow fiscal policies, procedures, and PID program requirements.
25%	E	Assists with reviewing draft PSRs and other PID documents for accuracy, completeness, and alignment with department guidelines, planning standards, the Project Development Procedures Manual, CAPTI/CSIS expectations, and other statewide planning frameworks. Helps identify inconsistencies and recommends straightforward corrections to support document quality across both SHOPP and non-SHOPP PID work. Supports the maintenance of organized PID files, document repositories, database records, and financial tracking tools used for project prioritization and statewide reporting. Assists with compiling audit materials, preparing basic compliance summaries, and responding to routine questions about funding status, project scope documentation, or resource use. Provides general guidance to Planning staff on standard PID documentation practices, early consultation recordkeeping, database updates, and file organization to support consistent and compliant district recordkeeping procedures.
15%	E	Helps prepare monthly and quarterly reports on PID funding, workload, and project status. Gathers and verifies data from district systems and compiles it into standardized formats used by management, District leadership, and Headquarters Planning. Assists with identifying basic trends, process issues, or early schedule risks affecting delivery of SHOPP and non-SHOPP PIDs. Provides technical support for AMT by entering and validating data, assisting with troubleshooting, and generating routine reports. Helps coordinate monthly PID meetings, prepare agendas, organize meeting notes, and respond to routine stakeholder inquiries. Suggests improvements to district tracking tools, early engagement documentation, and reporting processes to enhance workflow efficiency and data accuracy.
10%	M	Provides general support to District 5 transportation planning staff and project partners. Helps gather data, prepare supporting materials, update tracking tools, and assist with planning studies, outreach, and documentation needs. Supports development and maintenance of the district's prioritized project lists, including contributions to the statewide Ten-Year Non-SHOPP Investment Plan and coordination on the district's three-year non-SHOPP PID workplan. Assists with monitoring district priorities, maintaining project databases, and ensuring that project information remains current and aligned with state policy goals. Work is performed under guidance, with opportunities to identify small process improvements or ways to increase program efficiency.

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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