

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

| | | |
|--|---|-----------------------------|
| CLASSIFICATION TITLE Transportation Planner | OFFICE/BRANCH/SECTION District 5/Transportation Planning/System Planning | |
| WORKING TITLE Transportation Planner | POSITION NUMBER 905-800-4768-xxx | REVISION DATE 04/23/2026 |

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 the Senior Transportation Planner, the Transportation Planner is the entry-level position assisting as a liaison between Caltrans and the local transit and rail operators in the district. The incumbent will provide input into Caltrans oversight and maintenance of funded projects in the region as well as input into the development of major policy documents and reporting requirements impacting both federally and State funded transit programs administered by Caltrans. The documents include, but are not limited to, reports, handbooks, manuals and policy guidance supporting transit operations and rail programs. The incumbent works with other functional units to ensure compliance with the applicable federal and State statutes as they relate to transit projects, and will take action, as necessary, to maintain compliance with program requirements. This position accomplishes these responsibilities through the collaboration and coordination of key stakeholders, including the Federal Transit Administration (FTA), Caltrans headquarters and district programs, regional and local transportation agencies, and numerous State departments concerned with transportation services.

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.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (Equity - Innovation, Stewardship)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety - Equity, 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 - Innovation, Stewardship)
- **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 - Collaboration, Integrity, Stewardship)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Equity, Prosperity - Collaboration, People First, 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. (Equity - Innovation, Integrity, 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. (Safety, Equity - Collaboration, Integrity, People First, Stewardship)
- **Forward Thinking:** Anticipates the implications and consequences of situations and takes appropriate actions to be prepared for possible contingencies. Anticipates and prepares for future developments. (Equity - Innovation, Integrity)
- **Organizational Skills:** Keeps work prioritized and organized. Logically approaches situations. (Equity - Integrity, Stewardship)

TYPICAL DUTIES:

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

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| 40% | E | Transit Planning | Assists in responding to transit-related inquiries, issues, and opportunities that arise from transit agency partners. Assist in the integration of transit planning into the multi-modal corridor planning process. Support development of district transit planning tools and resources to support delivery of transit improvements in Caltrans rights of way. Communicate with local and regional partners to identify transit and other modal needs on the State Highway System. Participate in the development of District-wide, regional, and local transit and active transportation planning efforts affecting the State Highway System. Assist in District-wide or system-wide planning efforts aimed at increasing the viability, convenience, and effectiveness of transit service. Assist in developing a range of local, regional, District, or statewide efforts including the statewide transit plan, state rail plan, intercity bus plan, short range transit plans, and other efforts. Participating in coordinated transportation planning efforts across the district; identifying and helping facilitate opportunities for improving service (i.e. stop consolidation across agencies / reduction in overlapping service, etc.). |
| 25% | E | Program Evaluation, Compliance and Outreach | Under the guidance and review of the Senior Transportation Planner, evaluate and monitor programs to ensure conformity with FTA requirements and coordination with local planning processes. Under the guidance of the Senior Transportation Planner, interpret federal and state guidelines to develop program policies, procedures, and documents. Provide guidance and technical support to District staff, planning agencies and transit operators regarding program requirements and relevant state legislation, which may also require producing data, participating in fare systems, and more. Prepare reports and documents in response to audits and other program related reviews. Routinely assist with the conduction and coordination of transit rider experience audits on an equity-prioritized sample of district transit stops and routes. These will include evaluations of transit stop accessibility, safety, and comfort, physical stop consistency with GTFS location data, rider experience and traffic delay on-board transit vehicles. Assist local transit agencies with finding grant opportunities, pre-negotiated procurement options and other applicable resources. |
| 25% | E | Technical Analysis | Help provide technical assistance for System Planning and Investment Planning efforts. This can include providing information for multimodal corridor planning efforts and assisting in the development and analysis of multimodal travel data. Assist with collection of data, information, and resources to support Investment Planning/grant activities. Help process and analyze data to support evaluation, nomination, and application for grant opportunities for priority projects. Provide technical assistance to internal and external partners on key local transit projects not necessarily on the State Highway System. This includes assessing public transportation gaps in the region to provide recommendations for filling those gaps, aiding with transit zero emission technology transition activities, and providing technical assistance to local transit operators as they apply for State or FTA funded grant opportunities. |
| 10% | M | Cal-ITP Implementation and GTFS Oversight | Closely coordinate with the transit agencies and the Caltrans Division of Rail and Mass Transportation to support statewide Cal-ITP implementation. Using the Mobility Data GTFS Grading Scheme, commercial trip planning applications, and internal tools, routinely and systematically evaluate branding and information consistency between district GTFS feeds and other transit agency materials working within Cal-ITP framework. Maintaining schedules and/or GTFS data for agencies in the district and doing outreach to local agencies to help them publish. |

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

Ability to maintain current knowledge of pertinent State and Federal policies, procedures, and regulations regarding public transit.

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Requires knowledge of local planning processes, project management techniques, and negotiating skill in working with stakeholders and meeting project.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent has a responsibility to help ensure the principles and practices of transportation planning are carried out and implemented in accordance with the Federal and State laws. Errors could result in loss of credibility with federal, state, local agencies, stakeholders, advocacy group, tribal governments, and the public with which the Department interacts. Failure could result in delays and increased costs to the Department and to state and local partners.

PUBLIC AND INTERNAL CONTACTS

The incumbent interacts regularly with other staff within District 5 and throughout the Department, and with representatives of local, regional, state and federal agencies, stakeholders, advocacy groups, tribal governments, the general public.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical requirements are those usual to an office: use of office equipment (e.g., computers, phone, fax, etc.), accessing information in files and folders, interacting with co-workers and other customers and suppliers. Some travel, which may involve overnight stays, is required.

WORK ENVIRONMENT

The incumbent works in a typical florescent-lighted, climate-controlled, office environment in an older multi-story state office building. The incumbent must operate usual office equipment. On occasion, the incumbent will need to travel to other locations to attend meetings, make presentations, etc., in different offices, conference and convention facilities, and the like. If overnight stays were involved, these would generally be in hotel/motels or accommodations in Department facilities (e.g., lodging at Maintenance Stations). Travel would generally be via plane, train, car, public transit, bicycle, ferry or foot.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's 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

POSITION DUTY STATEMENT

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|--|---|-----------------------------|
| CLASSIFICATION TITLE Associate Transportation Planner | OFFICE/BRANCH/SECTION District 5/Transportation Planning/System Planning | |
| WORKING TITLE Associate Transportation Planner | POSITION NUMBER 905-800-4721-xxx | REVISION DATE 04/23/2026 |

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 a Senior Transportation Planner, the Associate Transportation Planner is the primary liaison between Caltrans and the local transit and rail operators in the district. The incumbent will provide input into Caltrans oversight and maintenance of funded projects in the region as well as input into the development of major policy documents and reporting requirements impacting both federally and State funded transit programs administered by Caltrans. The documents include, but are not limited to, reports, handbooks, manuals and policy guidance supporting State transit and rail programs. The incumbent works with other functional units to ensure compliance with the applicable federal and State statutes as they relate to transit projects, and will take action, as necessary, to maintain compliance with program requirements. This position accomplishes these responsibilities through the collaboration and coordination of key stakeholders, including the Federal Transit Administration (FTA), Caltrans' headquarters and district programs, regional and local transportation agencies, and numerous State departments concerned with transportation services.

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. (Prosperity - Collaboration, Equity, Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety - Integrity, Stewardship)
- **Reliability:** Ability to demonstrate dependability in meeting commitments, and providing a consistent work product. Takes responsibility for individual actions in order to meet deadline demands. (Equity, Prosperity - Innovation, Integrity)
- **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. (Equity - Equity, 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. (Climate Action, Prosperity - Collaboration, 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 - Collaboration, Innovation, 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. (Safety, Equity - Collaboration, Integrity, Pride)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Safety - Equity, Integrity, Stewardship)
- **Technical Expertise:** Depth of knowledge and skill in a technical area. (Equity - Innovation, Stewardship)

TYPICAL DUTIES:

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

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| 25% | E | Program Evaluation, Compliance and Outreach | Evaluate and monitor programs to ensure conformity with FTA requirements and coordination with local planning processes. Accurately interpret federal and state guidelines to develop program policies, procedures, and documents. Provide guidance and technical support to District staff, planning agencies and transit operators regarding program requirements and relevant state legislation, which may also require producing data, participating in fare systems, and more. Prepare reports and documents in response to audits and other program related reviews. Routinely conduct and coordinate transit rider experience audits on an equity-prioritized sample of district transit stops and routes. These will include evaluations of transit stop accessibility, safety, and comfort, physical stop consistency with GTFS location data, rider experience and traffic delay on-board transit vehicles. Assist local transit agencies with finding grant opportunities, pre-negotiated procurement options and other applicable resources. |
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KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

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Requires knowledge of local planning processes, project management techniques, and negotiating skill in working with

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stakeholders and meeting project.

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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