

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION D5 Division of Transportation Planning & Local Assistance	
WORKING TITLE Associate Transportation Planner	POSITION NUMBER 905-800-4721-044	REVISION DATE 06/10/2026

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

GENERAL STATEMENT:

In the District 5 (D5) Regional Planning Branch within the D5 Division of Transportation Planning (DOTP), the Associate Transportation Planner (ATP) works at the journey level under the direction of the Senior Transportation Planner (STP). The incumbent works independently on the more complex transportation planning tasks, products, projects and programs. This work is subject to a variety of federal and state regulations; in cooperation/partnership with federal, state, local agencies and the general public.

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. (Equity - Innovation, Integrity, Pride)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Climate Action - 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. (Employee Excellence - Integrity, Pride, 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, Prosperity, Employee Excellence - Innovation, Integrity, People First)
- **Interpersonal Savvy/Partnering:** Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Employee Excellence - Collaboration, Integrity)
- **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 - Innovation, 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. (Employee Excellence - Collaboration, Integrity, Pride)
- **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 - Collaboration, Innovation)
- **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. (Employee Excellence - Integrity, Pride, Stewardship)

TYPICAL DUTIES:

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

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

50%	E	Regional Planning	<p>Serve as D5 liaison with partner agencies within a specified geographic area. Work closely with local, county, regional, state agencies and tribal governments to ensure coordination and partnerships for addressing transportation issues. Assist with the coordination of the Overall Work Plan (OWP) and Regional Transportation Plan (RTP). Assist with general coordination between Regional Transportation Planning Agency/Metropolitan Planning Organization (RTPA/MPO) staff and Caltrans staff. Prepare a variety of deliverables related to coordination and liaison duties including written correspondence, progress reports, pre-meeting agenda review and briefings, and post-meeting minutes. Administer RTPA/MPO expenditure of FHWA (PL) and FTA (5303) funds consistent with the OWP. Facilitate RTPA/MPO OWP amendments when necessary.</p> <p>Coordinate with Caltrans divisions at the D5 and Headquarters (HQ) levels regarding consistency between Caltrans and local and regional planning documents. Assist with the preparation of fact sheets and multimedia presentations to external agency staff and board members in order to promote D5 and statewide Multi-Modal System Planning efforts. Prepare D5 management for monthly RTPA/MPO board meetings and participate on RTPA/MPO technical advisory committees.</p> <p>Assist in analyzing proposed plans and policies from other government agencies; monitor and certify the regional transportation planning process for conformance with state and federal requirements; provide transportation planning expertise to local, regional, federal, state and transit agencies to carry out the transportation planning processes; provide general input to transportation planning partners through working group meetings.</p>
25%	E	Community Planning and Sustainable Transportation Planning Grants	<p>Serve as D5 liaison and advisory team member on local, regional, and community-based planning efforts that have a nexus to the State Highway System. Ensure continuity between Caltrans statewide and D5 policies and plans and local and regional planning efforts. Engage with appropriate functional unit staff to inform local, regional, and community-based planning efforts on the State Highway System that are consistent with Caltrans safety and design guidelines. Steward outcomes and recommendations of these transportation planning efforts through D5 Multi-Modal Systems Planning and the Caltrans project development process.</p> <p>Participate in the annual district review of Sustainable Transportation Planning Grant applications. Oversee invoicing of grant funds to grantees within a specified geographic area.</p>
20%	E	Project Development Teams (PDTs)	<p>Serve as an active member of Caltrans D5 PDTs. Project proposals are to be sufficiently reviewed to ensure that projects are consistent with Caltrans Multi-Modal System Planning and state, regional, and local plans and policies. Coordinate internal development of the Transportation Planning Scoping Information Sheet (TPSIS) and communicate findings of the TPSIS to the PDT. Participate in review of key project deliverables throughout the project development process. Support the district Planning Management Liaison in their development of public engagement plans for Caltrans projects as applicable.</p> <p>Participate in quarterly State Transportation Improvement Program (STIP) and State Highway Operation and Protection Program (SHOPP) meetings between Caltrans and RTPA/MPO staff.</p>
5%	M	Peer review and comment on Statewide and D5 Multi-Modal Systems Planning, Smart Mobility, and Climate Change draft policy and plans.	

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 involve supervision over others. Under the general direction of a STP, the ATP is expected to work independently with little supervision and may act as lead worker.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Must have strong knowledge of transportation planning. Must have excellent writing abilities and be able and willing to produce

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

deliverables and meet agreed upon project milestones. Must have the ability to work independently and with interdisciplinary teams composed of Caltrans staff, local agency staff, and consultants. Must have the ability to plan, organize, prioritize, and complete assigned work. Must have the ability to establish and maintain cooperative relationships with state, federal, regional, and local agencies, the public, and other units within Caltrans. Must communicate effectively, both orally and in writing. Must be willing to take independent action in carrying Caltrans directives. Must have working knowledge of Adobe Acrobat and Microsoft Office software including Word, Excel, and PowerPoint. Proficiency in ArcGIS is highly desirable.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Consequences of error could be significant in terms of adversely affecting the Department's credibility and standing in the community, particularly with local community leaders and elected officials. Additionally, project delays could adversely effect funding and the capital program.

PUBLIC AND INTERNAL CONTACTS

The position requires regular contact with appropriate district and headquarters functional staff in addition to local agency staff, decision-makers and consultants. Routinely assist in coordinating and communicating with local and tribal governments, various state and federal agencies, community-based organizations (CBO's) and the general public. Will be required to prepare the Senior TP and/or management for public information meetings, public hearings, and individual meetings with these entities. Will be responsible as a Caltrans PDT member for stewarding outcomes and recommendations from public engagement efforts, regional planning process, and Multi-Modal Systems Planning efforts through the capital development process.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The employee may be required to sit for long periods of time using a keyboard and video display terminal. Must be able to develop and maintain cooperative working relationships; be tactful and treat others with respect. The incumbent is expected to accept personal responsibility for successfully meeting delivery milestones and exercise sound, professional judgment and tact. There is also an expectation that all employees will honestly report their time and communicate with the STP regarding leave requests. The incumbent is also expected to be somewhat flexible as assignments and duties can change over time. Also, occasional overtime may be required to meet the operational needs of the Division and the Department.

WORK ENVIRONMENT

While at their base of operation, employee will work in a climate-controlled office under artificial lighting. Travel for this position is required which may occasionally include overnight travel.

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.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION D5 Division of Transportation Planning & Local Assistance	
WORKING TITLE Transportation Planner	POSITION NUMBER 90-800-4768-xxx	REVISION DATE 06/10/2026

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

GENERAL STATEMENT:

In the District 5 (D5) Regional Planning Branch within the D5 Division of Transportation Planning (DOTP), the Transportation Planner (TP) is an interdisciplinary team member whom serves in a learning and support capacity. Under the supervision of the Senior Transportation Planner (STP), the incumbent will perform assignments to help execute transportation planning tasks, products, projects and programs. This work is subject to a variety of federal and state regulations; in cooperation/partnership with federal, state, local agencies and the general public.

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.

- **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 - Innovation, Integrity, Pride)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Climate Action - 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. (Employee Excellence - Integrity, Pride, 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, Climate Action, Prosperity - Innovation, Integrity, People First)
- **Interpersonal Savvy/Partnering:** Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Employee Excellence - Collaboration, Integrity)
- **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 - Innovation, 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. (Employee Excellence - Collaboration, Integrity, Pride)
- **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 - Collaboration, Innovation)
- **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. (Employee Excellence - Integrity, Pride, Stewardship)

TYPICAL DUTIES:

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

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

50%	E	Regional Planning	<p>Assist in serving as D5 liaison with partner agencies within a specified geographic area. Work closely with local, county, regional, state agencies and tribal governments to ensure coordination and partnerships for addressing transportation issues. Assist with the coordination of the Overall Work Plan (OWP) and Regional Transportation Plan (RTP). Assist with general coordination between Regional Transportation Planning Agency/Metropolitan Planning Organization (RTPA/MPO) staff and Caltrans staff. Help prepare a variety of deliverables related to coordination and liaison duties including written correspondence, progress reports, pre-meeting agenda review and briefings, and post-meeting minutes. Assist in administration of RTPA/MPO expenditure of FHWA (PL) and FTA (5303) funds consistent with the OWP. Facilitate RTPA/MPO OWP amendments when necessary.</p> <p>Support coordination with Caltrans divisions at the D5 and Headquarters (HQ) levels regarding consistency between Caltrans and local and regional planning documents. Assist with the preparation of fact sheets and multimedia presentations to external agency staff and board members in order to promote D5 and statewide Multi-Modal System Planning efforts. Help prepare D5 management for monthly RTPA/MPO board meetings and participate on RTPA/MPO technical advisory committees. Support peer review of D5 Multi-Modal Systems Planning products.</p> <p>Assist in analyzing proposed plans and policies from other government agencies; help monitor and certify the regional transportation planning process for conformance with state and federal requirements; facilitate contributing general input to transportation planning partners through working group meetings.</p>
25%	E	Community Planning and Sustainable Transportation Planning Grants	<p>Assist in serving as D5 liaison and advisory team member on local, regional, and community-based planning efforts that have a nexus to the State Highway System. Support continuity between Caltrans statewide and D5 policies and plans and local and regional planning efforts. Engage with appropriate functional unit staff to inform local, regional, and community-based planning efforts on the State Highway System that are consistent with Caltrans safety and design guidelines. Steward outcomes and recommendations of these transportation planning efforts through D5 Multi-Modal Systems Planning and the Caltrans project development process.</p>
20%	E	Project Development Teams (PDTs)	<p>Participate in the annual district review of Sustainable Transportation Planning Grant applications. Provide support for oversight of invoicing of grant funds to grantees within a specified geographic area.</p> <p>Participate as an active member of Caltrans D5 PDTs. Support sufficient review of project proposals to ensure that projects are consistent with Caltrans Multi-Modal System Planning and state, regional, and local plans and policies. Coordinate internal development of the Transportation Planning Scoping Information Sheet (TPSIS) and communicate and/or advocate findings of the TPSIS to the PDT. Participate in review of key project deliverables throughout the project development process. Support the district Planning Management Liaison in their development of public engagement plans for Caltrans projects as applicable.</p> <p>Participate in quarterly State Transportation Improvement Program (STIP) and State Highway Operation and Protection Program (SHOPP) meetings between Caltrans and RTPA/MPO staff.</p>
5%	M		<p>Assist in peer review and comment on Statewide and D5 Multi-Modal Systems Planning, Smart Mobility, and Climate Change draft policy and plans.</p>

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 involve supervision over others. Under the general direction of a STP, the TP is expected to work in a learning and support capacity.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Must have knowledge of transportation planning. Must have excellent writing abilities and be able and willing to produce

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

deliverables and meet agreed upon project milestones. Must have the ability to work in a support capacity and with interdisciplinary teams composed of Caltrans staff, local agency staff, and consultants. Must have the ability to plan, organize, prioritize, and complete assigned work. Must have the ability to establish and maintain cooperative relationships with state, federal, regional, and local agencies, the public, and other units within Caltrans. Must communicate effectively, both orally and in writing. Must be willing to work in a supportive role in carrying Caltrans directives. Must have working knowledge of Adobe Acrobat and Microsoft Office software including Word, Excel, and PowerPoint. Proficiency in ArcGIS is highly desirable.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Consequences of error could be significant in terms of adversely affecting the Department's credibility and standing in the community, particularly with local community leaders and elected officials. Additionally, project delays could adversely effect funding and the capital program.

PUBLIC AND INTERNAL CONTACTS

The position requires regular contact with appropriate district and headquarters functional staff in addition to local agency staff, decision-makers and consultants. Routinely assist in coordinating and communicating with local and tribal governments, various state and federal agencies, community-based organizations (CBO's) and the general public. Will be required to prepare the Senior TP and/or management for public information meetings, public hearings, and individual meetings with these entities. Will be responsible as a Caltrans PDT member for stewarding outcomes and recommendations from public engagement efforts, regional planning process, and Multi-Modal Systems Planning efforts through the capital development process.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The employee may be required to sit for long periods of time using a keyboard and video display terminal. Must be able to develop and maintain cooperative working relationships; be tactful and treat others with respect. The incumbent is expected to accept personal responsibility for successfully meeting delivery milestones and exercise sound, professional judgment and tact. There is also an expectation that all employees will honestly report their time and communicate with the STP regarding leave requests. The incumbent is also expected to be somewhat flexible as assignments and duties can change over time. Also, occasional overtime may be required to meet the operational needs of the Division and the Department.

WORK ENVIRONMENT

While at their base of operation, employee will work in a climate-controlled office under artificial lighting. Travel for this position is required which may occasionally include overnight travel.

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.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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