

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Supervising Transportation Planner	OFFICE/BRANCH/SECTION Office of Strategic Investment Planning	
WORKING TITLE Chief, Office of Strategic Investment Planning	POSITION NUMBER 900-074-4725-921	REVISION DATE 06/30/2026

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

GENERAL STATEMENT:

Under general direction of the Deputy Division Chief, the Supervising Transportation Planner is responsible for developing and implementing the Department's Strategic Investment Planning Program including directing, managing, and overseeing the development and implementation of strategies related to performance-based transportation planning and program investments. This position is fundamental to linking Caltrans' short, mid-term and long-range planning to programming. The Supervising Transportation Planner directs, manages, and oversees the development and implementation of the tools needed to develop programming recommendations to executive management and others, as it relates to linking Transportation Planning documents and prioritized project lists to potential funding sources. The position proactively advances policies, strategies, and tools to focus on providing trans-formative, multi-modal recommendations that promote travel options to enrich all communities.

CORE COMPETENCIES:

As a Supervising 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. (Employee Excellence - Innovation)
- **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 - Innovation, People First)
- **Ethics and Integrity:** Demonstrated concern to be perceived as responsible, reliable, and trustworthy. Respects the confidentiality of information or concern shared by others. Honest and forthright. Conforms to accepted standards of conduct. (Employee Excellence - Equity, Innovation, Integrity)
- **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. (Employee Excellence - Collaboration)
- **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. (Prosperity, Employee Excellence - Collaboration, Equity)
- **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. (Employee Excellence - Collaboration, Innovation)
- **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 - Pride, Stewardship)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Stewardship)
- **Organizational Skills:** Keeps work prioritized and organized. Logically approaches situations. (Equity, Employee Excellence - Innovation, Pride)

TYPICAL DUTIES:

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

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40%	E	Direct and manage the overall implementation of the Department's Strategic Investment Planning Program including overseeing the development of strategies for the purpose of equitably improving the multimodal transportation network, equity and livability in all communities. Utilizing the Caltrans System Investment Strategy (CSIS), prioritize projects for major non-State Highway Operations and Protection Program (SHOPP) funding programs that enrich all communities. Oversee and manage the preparation of key policies, procedures, tools, analyses, and training to provide direction to Caltrans Headquarters and Districts on the methodology for the project selection process. Significant coordination and communication with internal and external partners, including Caltrans' Executive Management, SB 1 Program Manager, Headquarters Division of Transportation Planning (DOTP) Offices, Divisions of Transportation Financial Programming, Rail and Mass Transportation, Traffic Operations, Districts, USDOT, California Transportation Commission staff, California Transportation Agency (CalSTA), and others.
25%	E	Presents recommendations and findings in a user-friendly format, such as charts or dashboards, and make comparisons with similar or historical data, and discusses the findings for state and federal competitive discretionary funding programs. Direct and manage a process to identify, analyze, and implement project prioritization utilizing quantitative and qualitative performance measures to nominate for various funding programs; this includes developing necessary tools, training, and analysis methodology.
25%	E	Liaison between the DOTP Offices, SB 1 Program Manager, Divisions of Financial Programming, Rail and Mass Transportation, Asset Management, Traffic Operations, Caltrans' districts, US DOT, California Transportation Commission staff, and external partners for non-SHOPP programs which include, but are not limited to: Senate Bill 1 discretionary funding programs, federal discretionary funding programs, Interregional Transportation Improvement Program/ Interregional Improvement Program, State Transportation Improvement Program/Regional Improvement Program, SHOPP project coordination. Ensures the program fosters partner, stakeholder, and public engagement and input, including from partners representing disadvantaged communities. Strong leadership, communication, partnership, and strategic thinking skills, as well as a deep commitment to the Department's strategic vision, mission, values, and goals, to provide excellent customer service, and to advance equity through all efforts.
10%	M	Provide technical assistance and training to headquarters and district units as well as stakeholders on program activities within this office. Provide quick responses to Caltrans' management and California State Transportation Agency on special assignments and information requests; monitor, evaluate, and respond to federal and State transportation related legislation, regulations, guidance, and procedures. Perform other job-related duties 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

The position is a full managerial position responsible for policy development, implementation, and management of a statewide program. The position provides first line supervision to the senior staff, and will oversee the work of all entry and journey level staff within the Office.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

All phases of transportation planning and transportation programming processes; the Department's mission, visions, goals, organization, policies, and procedures; Federal and State laws and regulations; Concepts and terminology relating to program management; transportation planning; and procurement management (e.g. techniques of selecting and managing outside consultants). Knowledge of multimodal system and corridor planning, project development, and programming processes. Key concepts and critical nature of transportation equity.

Ability to:

Effectively communicate (oral and written) with management, technical, and non-technical personnel. Ability to develop programs and supporting activities; analyze, interpret and apply analytical techniques; work independently and as a core member on complex planning projects; and develop and work with databases. Direct and oversee policies, plans, and programs with awareness and sensitivity to social, political, economic, and environmental issues.

Additional Desirable Qualifications:

Ability to develop and maintain effective relationships internally and externally for successful on-going interaction; knowledge of planning work done by Caltrans and its role in providing an effective multi-modal transportation system; effective supervisory experience; multi-disciplinary project management experience; strong interpersonal and presentation skills; ability to develop and innovate effective solutions for transportation problems and effectively implement them; computer skills, including the use of word processing, spreadsheets, and presentation software.

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RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

System planning and the investment strategies are the basis for the short, medium, and long-range planning of the entire statewide transportation system. It includes assessing and identifying improvements for a variety of important elements including system operations and management, sustainable planning, addressing climate change, complete streets, and others. Errors in guidance, implementation, coordination, and carrying out Federal law and regulations related to the previously identified system planning responsibilities could have negative impacts. Consequences of errors could lead to Caltrans' management not having sufficient information to make informed decisions on funding programs. Errors in guidance, implementation, coordination, and carrying out state and federal law, regulations, and policies could have negative impacts on the Department's ability to effectively provide transformative, sustainable, multi-modal options to the traveling public.

PUBLIC AND INTERNAL CONTACTS

Routine internal contacts with the Director's Office, DOTP Offices, Headquarters Divisions of Traffic Operations, Transportation Financial Programming, Research, Innovation and System Information, Rail and Mass Transportation, Traffic Operations, CTC staff, USDOT, Federal Liaison, CalSTA, and others. Frequent involvement with District Planning and Programming, Metropolitan Planning Organizations and Regional Transportation Planning Agencies. Contact with USDOT and Federal Highway Administration are less frequent but will occur.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Develop and maintain cooperative working relationships. Deal effectively with pressure; maintain focus and intensity yet remain optimistic and persistent, even under adversity. Create a work environment that encourages creative thinking and innovation. Enable others to acquire tools and support they need to perform well. Develop new insights into situations and apply innovative solutions to make organizational improvements. Create and sustain an organizational culture, which encourages others to provide the quality of service essential to high performance and productivity. The incumbent should act in a fair and ethical manner, demonstrate commitment to public service, develop organizational improvements, foster a creative and innovative work environment, be willing to take intelligent risks, and value equity and diversity in the workforce. Adjust rapidly to new situations warranting attention and resolution.

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. The employee will work in an office environment, but will be required to travel in state and out-of-state, to meet with customers, or attend meetings and conferences.

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