

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Sr Transportation Planner	OFFICE/BRANCH/SECTION Office of Transit Grants and Contracts	
WORKING TITLE FTA Grants Management Specialist	POSITION NUMBER 900-064-4724-919	REVISION DATE 07/20/2026

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

GENERAL STATEMENT:

Under the general direction of the Supervising Transportation Planner (Office Chief), the Senior Transportation Planner administers federal grants for various Federal Transit Administration programs, including all aspects of Federal grant awards, balances, reconciliations and reporting. The Senior Transportation Planner applies expert transportation planning knowledge of the Federal programs administered by the Division for the development of program grant balances. The Senior Transportation Planner provides technical assistance on grant administration to program managers and staff within Division of Mass Transportation (DMT), by monitoring grant activities and balances, maintaining accurate financial information in various data systems, preparing management reports and ensuring compliance with FTA grant requirements.

CORE COMPETENCIES:

As a Sr 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.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Prosperity - Innovation, Stewardship)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - Collaboration, Innovation)
- **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 - Collaboration, Innovation)
- **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. (Prosperity - Collaboration, Equity, Pride)
- **Empower Others:** Convey confidence in employees' ability to be successful, sharing significant responsibility and authority; allowing employees freedom to decide how they will accomplish their goals and resolve issues. (Prosperity, Employee Excellence - Collaboration, Equity, 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. (Prosperity - Innovation)
- **Interpersonal Effectiveness :** Effectively and appropriately interacts and communicates with others to build positive, constructive, professional relationships. Tailors communication style based on the audience. Provides and is receptive to feedback. (Prosperity - Innovation)
- **Workforce Management:** Hires and retains appropriate staff. Conducts workforce and succession planning. Provides feedback on performance. Addresses employee issues in a timely manner. (Prosperity - Collaboration)
- **Managing Performance:** Responsible for employee performance, setting clear goals and expectations, tracking progress against departmental and unit goals, providing feedback, and addressing performance issues promptly. (Prosperity - Collaboration)

TYPICAL DUTIES:

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

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30%	E	As a technical expert, perform the most complex and specialized transportation planning work related to the Federal Transit Administration (FTA) 5307 and 5339 Small Urban programs for Caltrans. Serves as the primary point of contact and leads negotiations between transit agencies and Metropolitan Planning Organizations (MPOs). Researches available federal grant funds and determines how funds are apportioned among eligible transit operators in small urbanized areas. Makes program-level decisions involving the allocation of millions of dollars in federal funding and prepares and submits annual sub-allocation letters to FTA Region 9. Researches new funding opportunities within FTA and remains current on updated FTA guidelines. Prepares, reviews, and updates departmental policies and procedures related to transit grant funding in accordance with federal, state, and Caltrans laws, regulations, policies, and procedures. Develops tracking methodologies using the FTA TrAMS system to monitor when urbanized funds are encumbered and establishes regular notifications to prevent fund lapses. Develops and maintains reporting to FTA to demonstrate appropriate allocation of urban grant funds. Gathers and disseminates information of statewide significance during meetings with transit agencies and MPOs, which is essential to the mission of the Office of Transit Grants and Contracts. Coordinates and leads meetings and serve as the primary point of contact for Transit Grants and Contracts. Interacts with the FTA and other internal and external mass transportation stakeholders.
30%	E	Administers transit grants funded through the Elderly and Disabled Specialized Transit (5310), Rural Transit (5311), Intercity Bus (5311(f)), and Bus and Bus Facilities (5339) programs, ensuring full compliance with FTA regulations. Interprets federal and state guidance to develop program policies, procedures, and related documents. Provides expert technical transportation planning assistance to Districts, planning agencies, and transit operators on program requirements. Collaborates with staff within the program and across other DMT programs to ensure consistent implementation statewide. Develops grant applications using the FTA's award management system (TrAMS), FTA electronic grant management tools, and Caltrans Advantage. Prepares project budgets and milestone schedules for inclusion in Caltrans' annual grant applications to FTA. Monitors active grants, including preparing amendments, budget revisions, and other necessary updates.
10%	E	Manages grants after award by the FTA, including approving eligible expenditures, processing reimbursement requests, monitoring available funding, and preparing and submitting all required reports in accordance with applicable FTA Circulars. Prepares Annual Performance Reports, Milestone Progress Reports, and National Transit Database submissions. Ensures all required certifications, assurances, and related plans are updated and submitted to maintain full compliance with FTA requirements. Evaluates and monitors transportation planning program activities to ensure adherence to FTA regulations and alignment with local and regional planning processes. Prepares reports, documentation, and responses for audits and other program-related reviews.
10%	E	Establishes and maintains Cost Accounting coding to ensure federal grants are properly monitored, reconciled, and accurately reflected in expenditure reports. Ensures Standard Agreements and Purchase Orders executed by DMT with local agencies are coded correctly based on the associated grant awards. Coordinates with the Division of Accounting to establish new coding in the Department's accounting system as needed. Performs quarterly reconciliations of expenditures, reimbursement requests, and draw down activity. Identifies and resolves issues found during the reconciliation process in coordination with the Division of Accounting and DLA program managers. Verifies and requests draw downs of federal funds through the Division of Accounting to assist in ensuring the Department is reimbursed promptly for all eligible grant expenditures.
10%	E	Provides guidance and technical assistance to Districts, planning agencies, and transit operators on program requirements. Coordinates with staff within the program and across other Division of Rail and Mass Transportation programs to ensure consistency in program implementation.
5%	E	Provides Transit Grants assistance to the FTA regional partners and the Department. Serves as a subject matter expert in grants management and provides technical guidance, including acting as back-up to the Branch Chief when needed. Completes the annual Budget Bill Language Drill and the annual Program Code review. Reconciles the DMT annual budget and federal appropriations with the Division of Accounting records to ensure accuracy and alignment.
5%	M	Performs 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.

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SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

No supervision.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

This position requires comprehensive knowledge of State and federal accounting and budgeting practices, as well as FTA grant administration requirements. The ability to analyze and evaluate complex information, develop alternatives, and apply analytical techniques to recommend solutions to transportation-related issues. Proficiency with AMS, InfoAdvantage, and Datalink is essential, including creating Cost Accounting Setup and Cost Accounting Modification documents, preparing expenditure adjustment requests for new FTA grants, and collaborating with the Division of Budgets on appropriation management. The ability to communicate effectively both orally and in writing and maintain productive working relationships with internal and external partners. Knowledge of Federal and State laws related to transportation planning—including regulations on homeland security, programming, and transit project funding—is vital. The ability to work independently with minimal supervision, participate as an interdisciplinary team member, and manage multiple assignments simultaneously is also required. An understanding of the political and policy implications of departmental actions is desirable, along with knowledge of computer applications, research methods, analytical techniques, and planning processes involving transportation, environmental, land use, social, economic, fiscal, legal, and political considerations. Effective public participation techniques are also beneficial.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Consequences of error can be serious and far-reaching, affecting the Department but also regional transportation planning agencies, transit operators and transit service providers. The incumbent is frequently responsible for making recommendations on politically sensitive areas such as unmet transit needs findings, on new administrative regulations and resolutions of disputes brought about in the implementation of the programs. Failure to meet reporting and compliance requirements could result in the loss of federal funds.

PUBLIC AND INTERNAL CONTACTS

The incumbent participates in various meetings dealing with federal, State, regional and local agencies, transit operators, universities, community-based organizations and the public concerning the scope and content of assigned special projects. The incumbent initiates and maintains internal contact with various functional District staff, Accounting, etc., as well as HQ functional and program areas. The incumbent is expected to maintain a continual dialogue with Department staff and local agency staff, as appropriate.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS**Physical Requirements:**

The ability to work on a keyboard; manual dexterity; staying in the stationary position for long periods; develop and maintain cooperative relationships; ability to focus for long periods of time. This position may require occasional bending, stooping and kneeling. Employees may be required to move large or cumbersome reports from one location to another.

Mental Requirements:

The ability to grasp the essence of new information and master new technical and business knowledge. The ability to organize and prioritize large volumes of varied documents. Has the ability for innovative solutions to situations to make organizational improvements. Creates and sustains an organizational culture which encourages team members to provide the quality of service essential to high performance.

The ability to organize and prioritize a workload that is subject to frequent, substantial, and unexpected changes.

Emotional Requirements:

The ability to develop and maintain cooperative working relationships. Ability to resolve emotionally charged issues reasonably and diplomatically. Considerate to the needs, feelings, and capabilities of different people in different situations; is tactful and treats others with respect

Behaves in a fair and ethical manner toward others and demonstrates a sense of responsibility and commitment to public service. Have the values of a culturally diverse workforce.

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'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 headquartered location as needed to meet operational needs. Business travel may be required, and reimbursement considers an employee's designated headquartered 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
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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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