

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION Office of Transit Grants and Contracts	
WORKING TITLE Rural and Small Transit Operators Branch	POSITION NUMBER 900-064-4768-919	REVISION DATE 07/23/2026

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, Chief, Rural & Small Transit Operators Branch in the Division of Mass Transportation (DMT), the incumbent works under the State's management of the Federal Transit Administration (FTA) Section 5311 and 5311(f) programs. These programs provide grants for public transit operators in rural areas as identified by the FTA. The incumbent reviews and evaluates annual Section 5311 grant applications and ensure the timely processing of requests for reimbursements.

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.

- Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Equity - Innovation, Integrity)
- Decision Making**: Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Equity - 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. (Climate Action - 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. (Climate Action - 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 - Collaboration, Stewardship)
- Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Equity - Collaboration)
- 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)
- Planning and Results Oriented**: Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (Employee Excellence - Innovation)
- Organizational Skills**: Keeps work prioritized and organized. Logically approaches situations. (Employee Excellence - Integrity)

TYPICAL DUTIES:

Percentage Essential (E)/Marginal (M) ¹	Job Description
40% E	Reviews and evaluates FTA Section 5311 applications for program conformity. Provides assistance in the approval of projects for inclusion in the statewide Section 5311 application. Approves expenditures and requests for reimbursements. Coordinate program activities with Districts, planning agencies, transit operators and federal agencies.
30% E	Accurately interprets federal and state guidelines to develop program policies, procedures, and documents. Assists with guidance and technical support to Districts, planning agencies and transit operators regarding program requirements.

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25%	E	Evaluates and monitors program to ensure conformity with FTA requirements and coordination with local planning processes. Helps prepare reports and documents in response to audits and other program related reviews. Responds to inquires from externals, the public, and the Director to ensure that we meet their needs in a timely fashion.
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.

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS
None

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
The ability to logically organize and present information, identify problems, and develop well-supported recommendations. The knowledge of Federal and State laws governing transportation planning, programming, and transit project funding. Understanding of local planning processes, project management techniques, and effective negotiation strategies for collaborating with stakeholders and maintaining project schedules.
Knowledge of the transportation planning process, along with the ability to write clearly; gather, compile, analyze, and interpret data; evaluate issues accurately; and recommend sound courses of action.
Ability to create formats for presenting and displaying data; collaborate with other Caltrans divisions and external agencies; communicate ideas effectively in writing and verbally; and work collaboratively as part of a team.
Ability to recognize politically sensitive issues and understand their potential impacts on Caltrans, stakeholders, and customers. Familiarity with rail and bus project planning, programming, and funding policies and procedures is highly desirable.
Ability to identify the political and policy implications of departmental actions is also desired.
Knowledge of computer processing techniques and applications; research methods and approaches used in planning studies; and contemporary transportation, environmental, land-use, social, economic, fiscal, legal, and political issues. Familiarity with effective public participation methods is also desirable.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
The consequences of error can be significant and far-reaching, affecting not only the Department but also regional transportation planning agencies, transit operators, and transit service providers. The incumbent frequently provides recommendations on politically sensitive matters, new administrative regulations, and the resolution of disputes arising during program implementation. Failure to meet required reporting deadlines could result in the loss of federal funds.

PUBLIC AND INTERNAL CONTACTS
Maintain a wide range of regular contacts with individuals outside the Division of Mass Transportation through telephone, written communication, and in-person meetings. Engage frequently with district transit project coordinators, local transit operators, and other Department staff on matters related to the planning, programming, funding, agreement execution, and monitoring of State-funded rail and transit projects, as well as related transit policy. Building and maintaining effective working relationships with Districts, rural public transit providers, and the Federal Transit Administration is essential.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS
Physical Requirements:
To have the ability to work on a keyboard; manual dexterity; stay in the stationary position for long periods; develop and maintain cooperative relationships; ability to focus for long periods of time. This position requires occasional bending, stooping and kneeling. Employees may be required to move large or cumbersome reports from one location to another.
Mental Requirements:
The incumbent is able to quickly understand new information and acquire new technical and business knowledge. They effectively organize and prioritize large volumes of diverse documents and develop innovative solutions that support organizational improvement. They foster and maintain a culture that encourages team members to deliver the high-quality service essential for strong performance. The incumbent organizes and prioritizes a workload that is subject to frequent, significant, and unexpected changes.
Emotional Requirements:
Demonstrates the ability to develop and maintain cooperative working relationships. Shows sound judgment in resolving emotionally charged issues with reason and diplomacy. Is considerate of the needs, feelings, and capabilities of different individuals in varying situations, and interacts with others in a tactful and respectful manner. Behaves in a fair and ethical manner toward others and demonstrates responsibility and commitment to public service. Values and supports a culturally diverse workforce.

WORK ENVIRONMENT
While at their base of operation, employees will work in a climate-controlled office under artificial light. However, due to periodic

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problems with the heating and air conditioning, the building temperature may fluctuate.

Most employees will work in workstations within shared cubicles. Working hours will be set sometime between 6:00 a.m. and 6:00 p.m.

Overtime may be required, and vacations may be restricted, during peak times and fiscal year-end closing.

Employees will be required to travel in state and occasional out-of-state travel may be required. 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.

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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CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Associate Transportation Planner	Office of Transit Grants & Contracts	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Rural and Small Transit Operators Branch	900-064-4721-919	07/23/2026

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 of the Senior Transportation Planner, the Chief, Rural & Small Transit Operators Branch, in the Division of Mass Transportation (DMT), the incumbent works independently on the State’s management of the Federal Transit Administration (FTA) Section 5311 and 5311(f) programs. These programs provide grants for public transit operators in rural areas as identified by the FTA. Principal duties include the review and evaluation of annual Section 5311 grant applications and ensure the timely processing of requests for reimbursements.

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.

- **Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Equity - Innovation)
- **Decision Making**: Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Equity - 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. (Climate Action - 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. (Climate Action - 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 - Collaboration)
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- **Organizational Skills**: Keeps work prioritized and organized. Logically approaches situations. (Employee Excellence - Integrity)

TYPICAL DUTIES:

Percentage		Job Description
Essential (E)/Marginal (M) ¹		
40%	E	Independently Reviews and evaluates FTA Section 5311 applications for program conformity. Authorizes projects for inclusion in the statewide Section 5311 grant submission and approves expenditures and reimbursement requests. Coordinates program activities and information exchange with District offices, regional planning agencies, transit operators, and federal partners.
30%	E	Independently interprets federal and state guidelines to support the development of program policies, procedures, and documentation. Provides guidance and technical assistance to Districts, planning agencies, and transit operators on program requirements. Applies knowledge of local planning processes, project management practices, and negotiation techniques to work effectively with stakeholders and support timely project delivery.

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25%	E	Independently evaluates and monitors the program to ensure alignment with FTA requirements and consistency with local planning processes. Prepares reports and documentation in response to audits and other program reviews. Failure to meet reporting requirements can result in significant consequences, including the potential loss of federal funds. Responds to inquiries from external partners, the public, and the Director to ensure needs are addressed promptly and professionally. Recognizes politically sensitive issues and understands the potential implications for Caltrans, its stakeholders, and its customers.
5%	M	Performs other job-related duties within the scope of the classification as assigned.

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SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS
None

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
Ability to logically organize and present information, identify problems, and develop sound recommendations.
Knowledge of Federal and State laws governing transportation planning, programming, and transit project funding.
Understanding of the transportation planning process, along with strong writing skills and the ability to gather, compile, analyze, and interpret data, evaluate issues accurately, and recommend effective courses of action.
Ability to design formats for presenting and displaying data; collaborate with other Caltrans divisions and external agencies; communicate ideas clearly in both oral and written form; and work cooperatively as part of a team.
Familiarity with rail and bus project planning, programming, and funding policies and procedures is highly desirable.
Ability to recognize political and policy implications of proposed Department actions.
Knowledge of computer processing techniques and applications, research methods used in planning studies, and contemporary transportation, environmental, land-use, social, economic, fiscal, legal, and political issues. Familiarity with effective public participation techniques is also desirable.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
Errors can have serious and far-reaching impacts, affecting not only the Department but also regional transportation planning agencies, transit operators, and transit service providers. The incumbent frequently provides recommendations on politically sensitive issues, new administrative regulations, and the resolution of disputes that arise during program implementation.

PUBLIC AND INTERNAL CONTACTS
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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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