

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Associate Transportation Planner	Office of Transit Grants & Contracts (FTA Grants Mgmt)	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Associate Transportation Planner	900-064-4721-919	08/06/2026

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 the Senior Transportation Planner, the Branch Chief of Grants Management, the Associate Transportation Planner is a full journey-level position responsible for providing support and technical assistance in support of the Federal Transit Administration (FTA) grant programs administered within the Office of Federal Transit Programs (Federal Office) of the Division of Mass Transportation (DMT). The incumbent performs transit grant activities as required by the FTA. Duties include providing technical assistance about grants administration to program managers and staff within the Federal Office, monitoring grant activities and balances, maintaining accurate financial information in various data systems, preparing management reports and ensuring compliance with FTA grant requirements. This position may require travel.

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.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (Equity, Employee Excellence - Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - Innovation)
- **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. (Prosperity - Equity, 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. (Prosperity, Employee Excellence - Collaboration, Integrity)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Prosperity - Collaboration)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Prosperity - Collaboration, Equity)
- **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, Employee Excellence - Collaboration)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Collaboration)
- **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. (Prosperity, Employee Excellence - Collaboration, Integrity)

TYPICAL DUTIES:

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

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40%	E	Administer transit grants funded through the Elderly and Disabled Specialized Transit (5310), Rural Transit (5311), Intercity Bus (5311(f)), and the Bus and Bus Facilities (5339) Programs, ensuring projects comply with FTA regulations. Responsible for approving expenditures and requests for reimbursement and monitoring available funding, including FTA's electronic grant management system (TrAMS), Caltrans' accounting system (Advantage), and DMT's electronic grant management system (BlackCat Transit) input. Knowledge of AMS, InfoAdvantage; including creations of CAS and CAMs. Monitor activities on all active grants including preparation of amendments and budget revisions needed. Prepare project budgets and milestone schedules for inclusion in Caltrans' annual grant applications to FTA, using FTA's electronic grant management system. Manage multiple projects in coordination with FTA, Caltrans Accounting, and co-workers.
20%	E	Accurately interpret federal and state guidelines to develop program policies, procedures, and documents. Provide guidance and technical support to Districts, planning agencies and transit operators regarding program requirements. Knowledge of state and federal accounting and budgeting practices, local planning processes, project management techniques, and negotiating skills in working with stakeholders and meeting project schedules. Coordinate with staff within the program and in other programs to ensure consistency within DMT.
15%	E	Evaluate and monitor programs to ensure conformity with FTA requirements and coordination with local planning processes. Prepare reports and documents in response to audits and other program related reviews. The consequence of not meeting reporting requirements could potentially result in the loss of federal funds.
15%	E	Update and maintain the Statewide FTA Grant Compliance Plan. Responds to inquiries from external partners and stakeholders, members of the public, and the Director to ensure that we meet their needs in a timely fashion.
5%	M	Work with regional and local agencies, and all Caltrans Districts that may include Northern and Southern California, including other Caltrans' divisions to conduct site visits to project locations to assess progress, ensuring quality assurance and compliance with federal funding requirements. Ensure that action items identified during site visits are accounted for and addressed by conducting follow-up on-site review(s). Special Projects: Assist the Branch Chief and/or Office Chief on special assignments dealing with the administration and compliance of FTA grant programs. Help prepare Excel worksheets, pivot tables, and ad hoc reports on the status of grant projects. Assist other branches to help to review and score transit project applications, assist with collecting and reviewing transit agency reporting, and 5307 small urban fund tracking.
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
The incumbent does not supervise.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
Ability to apply administrative planning expertise to work.
Knowledge of human services transportation, FTA Grant Administrative requirements, and transportation emergency planning and procedures.
This involves data collection, research, and reporting related to federal transit grants.
The position requires analysis, evaluation, and development of alternative analysis.
The ability to apply analytical techniques to resolve or recommend solutions to transportation problems.
Ability to communicate effectively, both in writing and orally, and have the ability to develop and maintain effective working relationships, as well as work cooperatively with others.
Knowledge of Federal and State laws related to transportation planning including Homeland regulations and procedures, programming, and funding of transit projects is vital.
The ability to work with minimum direction and supervision, to initiate action independent, or as an interdisciplinary team member, to handle multiple assignments simultaneously is desirable.
The ability to perceive political and policy implications of actions that the Department is considering is desired.
Knowledge of computer processing techniques and applications, research methods and analytical techniques, including conducting or participating in planning studies, contemporary transportation, environmental, land use, social, economic, fiscal, legal, and political issues, and effective public participation techniques is also desirable.

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Ability to recognize issues that are politically sensitive and the potential ramifications on Caltrans, our stakeholders, and customers.
Knowledge of current priorities and programs, trends, and technical aspects for all of the FTA grant programs in the of Office including Drug and Alcohol laws, Safety Management Systems regulations and policies.
The ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
The incumbent is responsible for implementation of assigned tasks based on guidelines furnished by his/her supervisor or designated lead person. Work must be completed independently with specific recommendations. Decisions may be made in the absence of his/her supervisor's oversight in situations where immediate action is required. Consequences of an error in judgment could result in loss of credibility with Caltrans partners and can be serious and far-reaching, affecting not only the Department but also regional transportation planning agencies, transit operators and transit service providers.

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
Have ability to develop and maintain cooperative relationships with other employees and customers. Must be able to stay in the stationary position for long durations and perform tasks utilizing a PC. Develop insight into situations and apply innovative solutions to make organizational improvements. Formulates effective strategies consistent with the Departments' vision and goals. Create and sustain an organizational culture that encourages others to provide the quality of service essential to high performance.

WORK ENVIRONMENT
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. Employee may be required to travel. May need to extend day to complete vital projects.

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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CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION Office of Transit Grants & Contracts (FTA Grants Mgmt)	
WORKING TITLE Transportation Planner	POSITION NUMBER 900-064-4768-919	REVISION DATE 08/06/2026

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, Branch Chief of Grants Management, the Transportation Planner is an entry-level position responsible for providing support and technical assistance to the Federal Transit Administration (FTA) grant programs administered within the Office of Federal Transit Programs (Federal Office) of the Division of Mass Transportation (DMT). The incumbent performs transit grant activities as required by the FTA. Duties include providing technical assistance about grants administration to program managers and staff within the Federal Office, monitoring grant activities and balances, maintaining accurate financial information in various data systems, preparing management reports and ensuring compliance with FTA grant requirements. This position may require travel.

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.

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- **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, Employee Excellence - Collaboration, Integrity)
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TYPICAL DUTIES:

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

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45%	E	Assist in administering transit grants funded through the Elderly and Disabled Specialized Transit (5310), Rural Transit (5311), Intercity Bus (5311(f)), and the Bus and Bus Facilities (5339) Programs, ensuring projects comply with FTA regulations. Responsible for approving expenditures and requests for reimbursement and monitoring available funding, including FTA's electronic grant management system (TrAMS), Caltrans' accounting system (Advantage), and DMT's electronic grant management system (BlackCat Transit) input. Monitor activities on all active grants including preparation of amendments and budget revisions needed. Assist in preparing project budgets and milestone schedules for inclusion in Caltrans' annual grant applications to FTA, using FTA's electronic grant management system. Help manage multiple projects in coordination with FTA, Caltrans Accounting, and co-workers.
15%	E	Under the guidance and review of the Branch Chief and Associate-level Transportation Planners, interpret federal and state guidelines that contribute to the development of program policies, procedures, and documents. Assist in providing guidance and technical support to Districts, planning agencies and transit operators regarding program requirements. Requires knowledge of state and federal accounting practices, local planning processes, project management techniques, and negotiating skills in working with stakeholders and meeting project schedules. Coordinate with staff within the program and in other programs to ensure consistency within DMT.
15%	E	Help evaluate and monitor programs to ensure conformity with FTA requirements and coordination with local planning processes. Prepare reports and documents in response to audits and other program related reviews. The consequence of not meeting reporting requirements could potentially result in the loss of federal funds.
15%	E	Responds to inquiries from external partners and stakeholders, members of the public, and the Director to ensure that we meet their needs in a timely fashion.
5%	E	Assist Associate-level analysts in updating and maintaining the Statewide FTA Grant Compliance Plan.
5%	M	Performs other job-related duties within the scope of the classification as assigned.

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MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS
The incumbent does not supervise.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
The ability to apply administrative planning expertise to work.
Knowledge of human services transportation, FTA Grant Administrative requirements, and transportation emergency planning and procedures.
This involves data collection, research, and reporting related to federal transit grants.
The position requires analysis, evaluation, and development of alternative analysis.
The ability to apply analytical techniques to resolve or recommend solutions to transportation problems.
The ability to communicate effectively, both in writing and orally, and have the ability to develop and maintain effective working relationships, as well as work cooperatively with others.
Knowledge of Federal and State laws related to transportation planning including Homeland regulations and procedures, programming, and funding of transit projects is vital.
The ability to work with moderate direction and supervision, to initiate action independent, or as an interdisciplinary team member, to handle multiple assignments simultaneously is desirable.
The ability to recognize issues that are politically sensitive and the potential ramifications on Caltrans, our stakeholders, and customers.
Maintain basic knowledge of current priorities and programs, trends, and technical aspects for all of the FTA grant programs in the of Office including Drug and Alcohol laws, Safety Management Systems regulations and policies.
The ability to perceive political and policy implications of actions that the Department is considering is desired.
Knowledge of computer processing techniques and applications, research methods and analytical techniques, including conducting or participating in planning studies, contemporary transportation, environmental, land use, social, economic, fiscal, legal, and political issues, and effective public participation techniques is also desirable.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
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regional transportation planning agencies, transit operators and transit service providers.

PUBLIC AND INTERNAL CONTACTS

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Have ability to develop and maintain cooperative relationships with other employees and customers. Must be able to stay in the stationary position for long durations and perform tasks utilizing a PC. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. Develop insight into situations and apply innovative solutions to make organizational improvements. Formulate effective strategies consistent with the Departments' vision and goals. Create and sustain an organizational culture that encourages others to provide the quality of service essential to high performance.

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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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