

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION Advance Planning	
WORKING TITLE Transportation Planner - PID Coordinator	POSITION NUMBER 905-800-4768-XXX	REVISION DATE 08/05/2026

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 Advance Planning Management Branch Chief, the incumbent serves as an interdisciplinary team member and performs less-complex transportation planning work. The incumbent assists with planning, developing, and organizing activities that integrate social, economic, environmental, transportation, and land-use considerations to support implementation of a balanced, multi-modal State transportation program. The incumbent assists in the development of Project Initiation Documents (PIDs) and supports related workload reporting tools, data management practices, and PID Program functions. The incumbent also provides assistance in developing the State Highway Operation Protection Program (SHOPP) 5-year plan and related activities. Assignments may also be provided by the Office Chief and can include support for other Transportation Planning efforts. These may include, but are not limited to, regional planning, multimodal system planning, community planning, statewide planning, freight planning, active transportation, health and equity-related planning, climate change and air quality analysis, program and project planning, Native American consultation, modeling, geospatial data analysis, and economic studies.

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. (Employee Excellence - Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Prosperity - Stewardship)
- **Initiative:** Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Employee Excellence - Collaboration)
- **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. (Employee Excellence - Innovation)
- **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. (Employee Excellence - Collaboration)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - 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. (Equity - Collaboration, Integrity, People First, Pride)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Pride, Stewardship)
- **Diagnostic Information Gathering:** Identify information needed to clarify a situation, seeking that information from appropriate sources. (Employee Excellence - Innovation, Integrity, Pride)

TYPICAL DUTIES:

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

POSITION DUTY STATEMENT

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50%	E	Supports District 5 SHOPP and non-SHOPP Project Initiation Document (PID) development activities under the direction of senior staff. Works with district functional units, Headquarters Planning, and District Asset Managers to gather and verify project scope, needs, and asset information. Assists in preparing the Planning sections of PIDs and ensures information is accurate and consistent with statewide standards and policies. Helps resolve issues, compiles project documentation, and coordinates with the Design PID Unit to integrate inputs and prepare complete PIDs for management review and signature.
25%	E	Prepares monthly and quarterly PID funding, workload, and status reports by collecting and validating data from district systems. Assists with reviewing expenditure trends, workload issues, program risks, and emerging challenges. Drafts finance letters, issue memos, fact sheets, briefing materials, and other documents for senior staff review. Provides program support for the Asset Management Tool (AMT), including data entry, validation, troubleshooting, and report generation. Coordinates PID-related meetings, prepares agendas and summaries, and supports process improvements to enhance tracking, reporting, and workflow effectiveness for both SHOPP and non-SHOPP activities.
15%	E	Assists with reviewing transportation-related legislation, statewide policies, and planning directives to determine potential impacts on district programs. Supports research tasks, helps develop recommendations, and summarizes findings for senior staff. Assists with monitoring and evaluating regional transportation planning processes for compliance with State and Federal requirements. Provides planning support to Federal, State, regional, and local agencies, as well as transit operators, by supplying technical information, data, and guidance. Helps advance district efforts related to active transportation, transit, shared mobility, and transportation demand management.
10%	M	Provides analytical, organizational, and technical support for District 5 planning initiatives. Gathers and compiles planning data, assists with preparing project documentation, and develops materials for outreach and engagement. Helps maintain district project lists and contributes to statewide planning efforts such as the Ten-Year Non-SHOPP Investment Plan. Works with local agencies to support development of the district three-year non-SHOPP PID workplan. Identifies opportunities to strengthen planning processes, improve coordination, enhance data accuracy, and support district alignment with CAPTI, CSIS, and statewide transportation goals.

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 is not a supervisory position.

Supervision is received from the Branch Chief, but may be received from the Office Chief as well. Additional assignments may be generated by requests from other District units.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

This position requires the incumbent to understand and be able to articulate, both verbally and in writing, research and analysis methods, and their conclusions. The incumbent should have an understanding of and be able to communicate 1) principles, process, procedural practices and legal requirements of transportation planning and programming, 2) principles of project development and traffic operation applications 3) legislative processes, 4) roles and responsibilities of the Federal, State and Regional governments in providing transportation planning services, and 5) current departmental policies and programs.

The incumbent must have the ability to accurately compile, analyze, interpret, and summarize data and to apply analytical techniques to recommend creative solutions to address transportation problems using spreadsheet, word processing, and relational database applications. The incumbent must be able to produce completed staff work and communicate effectively both verbally and in writing. The incumbent must possess the ability to effectively prepare and deliver presentations using a variety of media including but not limited to computer presentation software, paper flip charts, white boards, and strip maps. The incumbent must effectively work individually or as an interdisciplinary team member.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Recommendations and actions made by this position may impact the Departments' overall Planning program and relationships with our regional and local agency and government partners. Actions regarding the Department's programs could result in the inefficient use of state funding, delay of project delivery, and ineffective transportation planning.

PUBLIC AND INTERNAL CONTACTS

The incumbent must work cooperatively and effectively with HQ functional divisions, District management and staff, external agencies, and may be required to make formal presentations or provide training at meetings or workshops.

POSITION DUTY STATEMENT

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PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to use a phone, computer, keyboard, and monitor for long periods of time in an office setting. Must be able to develop and maintain cooperative working relationships by demonstrating tactfulness and treating others with respect, make decisions in a fair and ethical manner, and demonstrate a sense of responsibility and commitment to public service. Must be open to change and new information, adopting new work methods in response to changing conditions or unexpected obstacles, and have the ability to multi-task and complete tasks accurately within deadlines and with short notice.

WORK ENVIRONMENT

Employees may be required to use a phone, computer, keyboard, and monitor for long periods of time in an office setting. The Division of Transportation Planning's core business hours are from 8:00 a.m. to 5:00 p.m., Monday through Friday, exclusive of any legal holidays or days of observance. The incumbent may be required to travel to work related events throughout the State as necessary.

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
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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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POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Associate Transportation Planner	Advance Planning	
WORKING TITLE	POSITION NUMBER	REVISION DATE
AssociateTransportation Planner - PID Coordinator	905-800-4721-XXX	08/05/2026

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 Advance Planning Management Branch Chief, the incumbent is an interdisciplinary team member. Incumbent works under Branch Chief direction to perform less complex planning work to plan, develop, organize activities which integrate various social, economic, environmental, transportation, and land use factors to support implementation of a balanced, multimodal State transportation program. The incumbent may assist in developing Project Initiation Documents (PIDs) and associated workload reporting tools, data management practices and PID Program functions. The incumbent also assists in the development of the State Highway Operation Protection Program (SHOPP) 5-year plan and related activities. Some assignments may be given by the Office Chief and may include assisting with other Transportation Planning efforts. This may include but not limited to, regional planning, multi-modal system planning, community planning, state planning, freight planning, active transportation, health, climate change, air quality, program project planning, Native American consultation, modeling, geospatial data analysis, and economics.

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.

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50%	E	Independently coordinates and manages District 5 SHOPP and non-SHOPP PID development activities. Works with district offices to gather, verify, and compile PIDs for current and future fiscal years. Prepares Planning sections of PIDs and collaborates with District Asset Managers to ensure all applicable assets are accurately captured for each project. Responsibilities include compiling project information, entering data into PID templates, and writing clear, cohesive sections that support project approval and advancement into project delivery. Coordinates with the Design PID Unit on section integration and preparation of the final PID package.
25%	E	Independently prepares monthly and quarterly PID funding, workload, and status reports by gathering and validating data from district systems and compiling information into standardized reporting formats for management and Headquarters Planning. Analyzes expenditure and workload trends, identifies process challenges and emerging issues, and prepares finance letters, issue memos, fact sheets, correspondence, and related program materials. Provides technical support for the Asset Management Tool (AMT), including data entry, validation, troubleshooting, and report generation. Additional responsibilities include responding to stakeholder inquiries, coordinating monthly PID meetings, preparing agendas and summaries, and recommending improvements to enhance PID tracking, reporting accuracy, early consultation documentation, and workflow efficiency.
15%	E	Assists with developing and analyzing transportation-related legislation; proposes, performs, and supports transportation planning research; and participates in monitoring, managing, and certifying the regional transportation planning process to ensure conformance with State and Federal requirements. Provides planning expertise to Federal, State, regional, and local agencies, as well as transit operators, to support statewide and regional planning activities. Promotes alternative transportation modes including active transportation, transit, ridesharing, bikesharing, and transportation demand management strategies.
10%	M	Provides analytical, organizational, and technical support for District 5 transportation planning activities and branch initiatives. Responsibilities include gathering and compiling planning data, supporting project documentation, preparing outreach materials, and updating district tracking tools. Assists with developing and maintaining district project lists, including contributions to the statewide Ten-Year Non-SHOPP Investment Plan and coordination with local agencies on the district three-year non-SHOPP PID workplan. Works with moderate independence and identifies opportunities to improve planning processes, resource coordination, data accuracy, multimodal project development, and alignment with CAPTI, CSIS, and statewide transportation goals.

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EMPLOYEE (Print)

EMPLOYEE (Signature)	DATE
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SUPERVISOR (Signature)	DATE
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