

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Associate Transportation Planner	District 12/Division of Strategic Portfolio Mangement	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Sustainability and Strategic Initiatives	912-280-4721-002	

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, Branch Chief of Sustainability/Strategic Initiatives, the Associate Transportation Planner performs duties related to implementation of strategic initiatives in District 12, including Sustainability, Efficiency, Innovation, Risk Management, Strategic Business Plan, Asset Management and Grant Writing. The incumbent may be assigned one or more of the strategic initiatives based on need and expertise. Reviews the statewide related initiatives and lead and engage district teams in putting together plans and tracking them for one or more of these initiatives, and be the point of contact with district and Headquarter counterparts, including forming and leading district team members that assist with implementation of plans related to these initiatives. Reviews and assists with Asset Management activities including updating and tracking the accuracy of the Asset Management Tool. Makes regular updates and presentations to management staff on progress and status of assigned initiatives.

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. (Prosperity, Employee Excellence - Innovation, Pride)
- Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - Collaboration, Innovation, Pride)
- 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, Integrity, Pride, Stewardship)
- 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. (Equity, Prosperity, Employee Excellence - Collaboration, Equity, Stewardship)
- 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 - Innovation, Pride, Stewardship)
- 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. (Safety - Collaboration, Equity, 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. (Employee Excellence - Collaboration, Innovation, Stewardship)
- 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. (Climate Action - Collaboration, Innovation, Pride)
- 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 - Innovation, Pride, Stewardship)

TYPICAL DUTIES:

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

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25%	E	Responsible for developing and implementing action plans related to strategic initiatives including sustainability, efficiency, innovation, Strategic Business Plan and enterprise risk management. Implement or be the point of contact for one or more initiatives related to the Caltrans Strategic Management Plan including updating and managing the District Business Plan. Works on implementing these initiatives and develop a plan for engagement by other divisions and input into these initiatives. Develop and present plans, updates and material in a clear and concise manner, and answer questions related to efforts in a team spirit. Work closely with other staff that will provide support for these initiatives. Provides support for the District's Asset Manager and other Strategic Portfolio Management (SPM) staff that will support the SPM Deputy, PPM Office Chief, and other division support. Work with District 12 Executive Management, the Headquarters Sustainability Program, Innovation or other programs, and with the District's divisions to establish and implement efforts associated with these strategic initiatives in District 12. Represents the interests of the District in meetings with external local agencies and internal management to obtain the best information to ensure the effective implementation of the program, and manages the District's efforts to effectively implement the program at the District level. Writes reports and prepares presentations. Represents Caltrans District 12, as needed, on sustainability issues at inter-or intra- departmental and public or private meetings and hearings. Prepare project nomination package for competitive grants, including collaboration with district functional units, HQ, and US DOT, and review competitive funding grant opportunity guidelines.
20%	E	Supports the District Asset Manager with various activities related to the Transportation Asset Management Plan, Asset Management Tool (AMT), review of statewide documents such as the State Highway System Management Plan, drafts SHOPP documents, tracks and resolves errors in the AMT, work with Program Advisors to generate proposed projects to meet performance outcomes, and provide any support needed by the District Asset Manager for internal or external communications related to Asset Management.
15%	E	Promotes efficiency measures in the district's various operations and projects, and take the lead to develop a plan to facilitate capturing efficiency ideas and efficiencies through innovative changes to processes or projects. This may include the aid of Lean 6 Sigma, including having or work towards being a green built expertise, process improvement through Kaizen processes, evaluating the cost of doing business, and reviews and recommends changes to operations and resources to doing work that will result in cost savings and efficiencies. Communicate efficiencies with the proper Headquarters programs to contribute to capturing mandated efficiencies measures.
15%	E	Leads or supports others to develop a District 12 Innovation Plan to gather input from various functional areas on innovative ideas and solutions and how to apply them. Leads a variety of cross functional teams to promote an innovation culture throughout the district and be a point of contact for these initiatives. Coordinate and deliver an annual or biennial Innovation Fair to highlight innovation efforts and solutions. Leads the district in participation in the statewide Innovation Fair to present district ideas and capture enhancements to the ideas to apply in District 12.
15%	E	Manages the District Strategic Business Plan to ensure updating to reflect the latest Caltrans Strategic Management Plan, and tracks and manages completion of action plans. Prepares periodic updates on accomplishments and status of performance target achievements. Develops recommendations for District Executive Management Team on adjustments that may be needed to achieve targets.
10%	M	Leads the facilitation of the application of sustainability principles by making efficient, risk-based, balanced decisions through the use of best practices; build relationships and adheres to policies with external partners and industry to achieve preservation and prosperity.

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
Will not supervise but may act as a lead and provide technical expertise. The incumbent may provide guidance to teams working in or with the branch on sustainability and strategic initiatives, such as efficiency, innovation, strategic business plan and enterprise risk management.

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KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Must know the Department's mission, goals, and programs, as well as laws, rules, and policies of the State of California regarding transportation issues and sustainability. The incumbent in this position is required to have excellent oral and written communication skills. Must be able to communicate both orally and in writing to be an effective advocate and leader of implementation of the Department's Sustainability, efficiency, innovation and Strategic Management Plan initiatives. Must be able to direct incorporation of Department input with up-to-date research to guide teams in the development of useful, performance-driven objectives, strategies and measurements to ensure the successful implementation of sustainability and other initiatives. Must be able to inspire and motivate Department staff and teams in the development and implementation of strategic initiatives for Department success. Must be able to perform effectively under rigid time constraints.

Have general knowledge of: Various aspects of Department operations, policies and directives, as well as knowledge of the principles for sustainability and other strategic initiatives in the transportation setting. It is beneficial to have knowledge of the planning processes and methods, systems planning, evaluation of options, and general concepts of what design, construction, operation and maintenance are, transportation economics and financing; project management concepts; factors which influence the impact of transportation facilities on the environment, the community and the economy.

Must have ability to: Plan work and collaborate with others; analyze situations and adopt an effective course of action; make effective presentations; prepare correspondence and reports; communicate effectively.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Implementation of the Department's Strategic Initiatives affects all statewide Department programs. Providing effective leadership in the development and implementation of the program is critical to the Department in meeting its goals. Consequences of ineffective leadership or errors can be serious and far-reaching, negatively affecting the Department, its Sustainability Program, and its partnership with regional and local transportation planning agencies, other state agencies, federal and local partners. The incumbent is responsible for making recommendations on politically sensitive areas such as policy, guidance, performance measurement, and public outreach regarding the implementation of the Sustainability Program; poor judgment in crafting these recommendations can damage or limit the program's implementation.

PUBLIC AND INTERNAL CONTACTS

Internal--the incumbent has regular contact with the District Executive Management Team and District personnel, HQ strategic initiatives programs, and Department executive management and program leaders statewide. External--The incumbent has contact with Federal Highway Administration, regional and local transportation agencies, metropolitan planning organizations, California Transportation Commission staff, the State Air Resources Board, other state, county and city departments and agencies. In addition the incumbent will have contact with state and local elected officials, regional ports and airports and sustainability consortium and advocacy groups.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent may be required to sit for periods of time using a keyboard and video display terminal. The incumbent should be able to quickly adapt behavior and work methods in response to new information, priorities, and unexpected obstacles; multi-task, effectively interact with many levels of people in a cooperative manner; be decisive; take appropriate actions; and complete tasks or projects with short notice. The incumbent should be able to deal effectively with pressure; adapt to changes in priorities; maintain focus and intensity yet remain optimistic and persistent, under adversity; develop and maintain cooperative relationships and the ability to focus for long periods of time. Must be considerate and respond appropriately to the needs, feelings and capabilities of different people in different situations; act in a fair and ethical manner toward others; demonstrate a sense of responsibility and commitment to public service; develop new insights into situations and apply innovative solutions; create a work environment that encourages creative thinking and innovation; value cultural diversity and other individual differences in the workforce.

WORK ENVIRONMENT

Incumbent will work in a cubicle in climate-controlled open office setting under artificial light. The building temperature may fluctuate. Must be able to perform work in remote settings including telework in compliance with State policies and requirements. Occasional travel may be required. Possession of a valid Driver's License is required when operating a state-owned or leased vehicle.

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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

POSITION DUTY STATEMENT

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CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION District 12/Division of Strategic Portfolio Mangement	
WORKING TITLE Sustainability and Strategic Initiatives	POSITION NUMBER 912-280-4768-XXX	REVISION DATE

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GENERAL STATEMENT:

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CORE COMPETENCIES:

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- Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Prosperity, Employee Excellence - Collaboration, Integrity, Stewardship)
- Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - Collaboration, Innovation, Pride)
- 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. (Prosperity, Employee Excellence - Stewardship)
- 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 - Pride)
- Relationship Building**: The ability to develop and maintain internal and external trust and professional relationships, which includes listening and understanding to build rapport. (Employee Excellence - Collaboration, Stewardship)
- 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, Pride, Stewardship)
- 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, Innovation, Pride)
- Analytical Skills**: Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Innovation, Stewardship)
- Commitment/Results Oriented**: Dedicated to public service and strives for excellence and customer satisfaction. Ensures results in their organization. (Prosperity, Employee Excellence - Stewardship)

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25%	E	Guides and/or supports others to develop a District 12 Innovation Plan to gather input from various functional areas on innovative ideas and solutions and how to apply them. Guides and assists in leading a variety of cross functional teams to promote an innovation culture throughout the district and be a point of contact for these initiatives. Coordinate and deliver an annual or biennial Innovation Fair to highlight innovation efforts and solutions. Leads the district in participation in the statewide Innovation Fair to present district ideas and capture enhancements to the ideas to apply in District 12.
25%	E	Work with HQ and develop a Sustainability Plan for the district. Assist in the facilitation of the application of sustainability principles by efficient, risk-based, balanced guidance through the use of best practices; build relationships and adheres to policies with external partners and industry to achieve preservation and prosperity.
10%	M	Supports the District Asset Manager with various activities related to the Transportation Asset Management Plan, Asset Management Tool (AMT), review of statewide documents such as the State Highway System Management Plan, drafts SHOPP documents, tracks and resolves errors in the AMT, work with Program Advisors to generate proposed projects to meet performance outcomes, and provide any support needed by the District Asset Manager for internal or external communications related to Asset Management.

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ADA Notice

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POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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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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