

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Sr Transportation Planner	OFFICE/BRANCH/SECTION District 1/PPM/Project Management	
WORKING TITLE Project Coordinator	POSITION NUMBER 901-200-4724-XXX	REVISION DATE

As a valued member of the Caltrans leadership team, you make it possible for the Department to provide a safe and reliable transportation network that serves all people and respects the environment.

GENERAL STATEMENT:

Under the general direction of the Office Chief of Project Management, the Senior Transportation Planner is responsible for coordinating Quality Management Assessment Process (QMAP) encroachment permit projects administered by others on the State Highway System, for serving as the program specialist for Non-SHOPP and STIP programs, and for tracking public engagement efforts within the district. As the QMAP coordinator, the incumbent will communicate and coordinate with the Project Development Team and the encroachment permit applicants to provide the support necessary for successful QMAP project delivery. As the program specialist for non-SHOPP and STIP programs, the incumbent is responsible for monitoring and coordinating project programming and funding considering the unique timelines and procedures for program development for each non-SHOPP program. In addition, the incumbent keeps the Office Chief of Project Management informed of all major issues that cannot be resolved at the Project Development Team level.

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.

- **Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, 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. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **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. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **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. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)

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- 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. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- Commitment/Results Oriented:** Dedicated to public service and strives for excellence and customer satisfaction. Ensures results in their organization. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)

TYPICAL DUTIES:

Percentage		Job Description
Essential (E)/Marginal (M) ¹		
60%	E	Serves as the point of contact for QMAP projects. Coordinates closely with Project Managers, local agencies, Regional Transportation Planning Agencies, Tribes, and other external agencies ensuring collaboration and communication. Represents the District at meetings with community groups, external agencies, and elected officials fostering positive relationships. Serves as liaison for project deliverables between the external agencies and Caltrans.
20%	E	Develops, coordinates, and executes agreements between Caltrans and external partners which may include cooperative agreements, financial contribution agreements, maintenance agreements, highway improvement agreements, or other agreements required for each project.
5%	M	Serves as the district point of contact for non-SHOPP transportation programs. Coordinates closely with District Planning, Asset Management, Project Managers, District functional units, and Headquarters for the development of programming documents, project proposals, and program applications. Serves as the subject matter expert in funding guidelines for non-SHOPP transportation programs such as STIP, ATP, and various other programs. Will perform a variety of planning work related to the coordination of these funding programs and the associated projects.
5%	M	Supports Project Managers with public engagement efforts which include coordination with District Planning and the Public Information Office on public engagement policy and strategies, ensures public engagement plans are carried through project delivery, and stakeholder engagement tracking. Promotes continuity of outreach and engagement outcomes and findings from early planning through the project development processes.
10%	E	Monitors and tracks projects using various tools including the Project Resource and Schedule Management (PRSM) system. This includes running reports to assist with monitoring all project milestones and resources. Reports timely and accurate project status information to District Management on a regular basis to ensure all staff involved with the projects are properly informed.

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 position does not supervise other employees. Incumbent receives general direction from the Office Chief of Project Management. Incumbent is expected to work independently with a high degree of initiative and motivation.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge: Must have knowledge of the project development process and general practices of transportation planning; familiarity with the requirements of all functional units involved in project development; project agreement development and management; Federal and State laws and regulations; concepts and terminology relating to transportation planning and project development; sources of funding transportation programs and associated guidelines; equitable stakeholder engagement best practices and effective public participation techniques; the Department's mission, organization, policies, and procedures; desktop and database computer applications that can create management reports.

Abilities: The incumbent must have the ability to provide the leadership necessary for the coordination of oversight and QMAP projects and schedules, as well as the successful delivery through multidisciplinary teams that involve input and consensus from the public, local officials, and fellow employees. The incumbent must be able to effectively coordinate, negotiate, and communicate orally and in writing with internal and external stakeholders. This position should demonstrate the ability to plan and organize work effectively, fostering collaboration and achieving project delivery in an efficient manner. Additionally, the incumbent must demonstrate the ability to work independently, effectively, and efficiently to coordinate and complete multiple assigned

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projects and tasks while working under pressure. The ability to consistently exercise good judgment and interpersonal skills is crucial to ensure effective representation of Caltrans to its partners, resulting in projects that meet the needs of the community and the traveling public.

Analytical Requirements: The incumbent must possess strong analytical abilities, including the capacity to analyze raw data, reason logically, recognize problems, and develop effective solutions. It is essential to be able to make informed recommendations for improvement and simplification based on analytical insights. The nature of the incumbent's work is intricate, detailed, multifaceted, and variable that requires independent action and decision making. The analytical requirements to navigate through complex situations, exercise sound judgment, and take initiative is crucial in this role.

Must have experience in the use of computer software programs, including Microsoft Teams, Word, Excel, PowerPoint, OneNote, SharePoint, and Smartsheet. A thorough understanding of the programming databases used by Caltrans, such as Project Resource and Schedule Management (PRSM) and California Transportation Investment Tool (CTIPs), is desirable.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent must be able to anticipate potential problems and proactively identify any issues that could impact project delivery and cost. Failure to identify and address these issues early on or to effectively coordinate and monitor the program with the assigned functional units can result in project delays, cost increases, or missed funding opportunities, which are unacceptable. These types of failure can cause distrust among stakeholders, including the District, California Transportation Commission, local agencies, and others to raise concerns about Caltrans' ability to effectively execute its programs. Therefore, it is imperative for the incumbent to exercise vigilance, foresight, and coordination skills to ensure successful project outcomes and maintain stakeholders' confidence in Caltrans' program delivery capabilities.

PUBLIC AND INTERNAL CONTACTS

The incumbent will engage in continuous contact with District functional units, management, and QMAP project applicants. This position requires effective coordination and communication with local governmental agencies, other state and federal agencies, and the public. The incumbent must effectively manage these interactions effectively and build strong partnerships to ensure that crucial project information is shared accurately and in a timely manner and maintains positive relationships with internal and external stakeholders.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent may be required to sit for long periods of time using a keyboard and video display terminal. Occasional field visits may involve the transportation of a laptop computer. The ability to multitask, adapt to changes in priorities, and efficiently complete tasks and projects with short notice is essential. The incumbent must deal effectively under pressure, as well as maintain focus and intensity even when faced with adversity. Developing and maintaining cooperative working relationships, as well as exhibiting tact and professionalism when interacting with the public and other Departments is a vital aspect of this position. The incumbent must be able to respond appropriately to difficult situations and skillfully resolve emotionally charged issues with reason and diplomacy. This role may require the ability to travel outside the primary work location, visiting other counties to engage with local transportation partners in the locality of the projects, and meet with Regional Transportation Planning Agencies, County Transportation Commissions, and other stakeholders.

WORK ENVIRONMENT

While at the base of operations, the incumbent works in a climate-controlled office with artificial lighting. Multi-floor buildings are equipped with elevators and stairs. There may be occasions that require travel and occasionally conduct field reviews outdoors that the incumbent may be exposed to dirt, noise, uneven surfaces, and/or extreme heat or cold. It is required for the incumbent to possess a valid driver's license to operate a State-owned or leased vehicle.

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. The incumbent is expected to be able to report to the worksite with minimum notification if an urgent need arises. The incumbent will be required to commute to the work 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.)

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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