

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Sr Transportation Planner	OFFICE/BRANCH/SECTION Office of Strategic Investment Planning	
WORKING TITLE Investment Planning Manager	POSITION NUMBER 900-074-4724-921	REVISION DATE 09/16/2026

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

GENERAL STATEMENT:

Under general direction of the Office of Strategic Investment Planning Chief, a Supervising Transportation Planner, the Senior Transportation Planner plans, organizes, and manages district and statewide investment planning work. This position is fundamental to linking Caltrans' short, medium, and long-range planning to programming. The incumbent works toward the development and implementation of the tools needed to develop programming recommendations in collaboration with internal and external partners. The position advances policies, strategies, and tools to focus on providing trans-formative, sustainable, and multi-modal recommendations that promote travel options and enrich all communities. This work requires extensive coordination and communications with internal and external partners, including Headquarters Division of Transportation Planning (DOTP) Offices, Divisions of Transportation Financial Programming, Rail and Mass Transportation, Traffic Operations, Districts, and others.

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.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (Equity - Innovation)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - Integrity)
- **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 - Integrity, Pride)
- **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. (Employee Excellence - Integrity)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Employee Excellence - Collaboration, Integrity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Collaboration, Integrity)
- **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 - Innovation, Integrity)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - 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. (Employee Excellence - Pride)

TYPICAL DUTIES:

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

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40%	E	In collaboration with DOTP Offices, Headquarters Programs, and Districts, direct and manage the overall implementation of the Department's investment planning activities and project nomination process for non-State Highway Operation and Protection Program (SHOPP) projects; this includes overseeing the development of strategies to equitably improve the multi-modal transportation network and livability in all communities. Manage the preparation of identifying, evaluating, scoring, prioritizing, and recommending non-SHOPP transportation projects for state & federal discretionary programs, which includes but not limited to, non-SHOPP State-Sponsored Project Initiation Documents (PIDs), SB 1 competitive programs Trade Corridor Enhancement Program (TCEP) and Solutions for Congested Corridors (SCCP), Active Transportation Program (ATP), Interregional Transportation Improvement Program (ITIP), State Transportation Improvement Program (STIP), Regional Improvement Program (RIP), federal Infrastructure discretionary funding programs, Better Utilizing Investments to Leverage Development Program (BUILD), Nationally Significant Freight and Highway Projects (INFRA), National Infrastructure Project Assistance (Mega Projects), Bridge Investment Program (BIP), etc., as well as formula programs. Develop and manage district and statewide lists of prioritized projects and maintaining the 10-Year non-SHOPP Investment Plan, including related project databases to ensure timely and accurate information. Present strategies, findings, and recommendations in a professional and user-friendly format to HQ & District management, California State Transportation Agency (CalSTA), HQ & District programs/divisions, and others.
30%	E	In collaboration with DOTP Offices, Headquarters Programs, and Districts, work to ensure projects that promote state goals and priorities are advanced into the programming and project delivery processes. Recommend project nominations for State-sponsored non-SHOPP PIDs, discretionary funding programs, & process requests for Caltrans letters of support submitted by the Districts and external partners. Collaborate with HQ programs and districts to develop grant applications for state and federal discretionary funding programs. Ensures guidance fosters partner, stakeholder, and public engagement and input, including from partners representing disadvantaged communities.
20%	E	In collaboration with functional subject matter experts, including, but not limited to, system planning, active transportation, freight, climate change, data, project initiation, transit, Programming, and Traffic Operations serve as the DOTP performance measure identification and monitoring lead. Develop tools and strategies for data and performance metrics to deliver state goals and priorities. Serve as liaison between HQ DOTP and districts on all investment planning-related activities; coordinate and collaborate through monthly meetings with districts, HQ programs/divisions, and partner agencies on priority projects and development of nomination proposals and grant applications; lead the development and implementation of district strategies to equitably improve multi-modal transportation network in consultation with key district/HQ functions and subject matter experts.
10%	M	Provide technical assistance and training to Headquarters, Districts, and stakeholders on program activities within this office. Provide prompt responses to Caltrans management and CalSTA on special assignments and information requests; monitor, evaluate, and respond to federal and State transportation related legislation, regulations, guidance, and procedures. Perform 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 position does not supervise, however this position acts as a project manager or team lead and in that capacity, and directs the work of others.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledgeable of Caltrans Mission, Vision, Goals, strategic objectives, programs, laws, regulations and policies of the State of California and federal government regarding various state and federal transportation competitive fund programs, Caltrans principles and practices of transportation planning, asset management, and various phases of project development.

Be able to communicate effectively (written and oral) with management and technical/non-technical personnel and work cooperatively with staff from a variety of Headquarters and District Divisions and with external agencies. The work also requires partnership, and strategic thinking skills, excellent customer services, as well as a deep commitment to the Department's strategic vision, mission, values, and goals, and advancing equity through all efforts.

Possess the ability to work independently and as a core member on complex assignments; write creatively and persuasively; research, analyze, and interpret technical data; organize data and information in an easy to understand format by preparing clear

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and concise reports and professional presentations; collaborate effectively in an interdisciplinary team and with other divisions and programs, both written and oral with all levels of staff; interpret federal and state grant guidelines. Have the ability to make timely decisions, develop technically-sound approaches and solutions in developing consensus among stakeholders, perform effectively under stressful situations with strict time constraints, prioritize critical assignments, and quickly adapt to changing priorities to meet immediate deadlines.

Possess intermediate to advance skills in Excel, Word, Powerpoint, and Adobe.

Possess general knowledge of the guiding principles of the Climate Action Plan for Transportation Infrastructure, investment planning strategies, various Caltrans databases, multi-modal system and corridor planning, grant application process, and programming process.

Additional Desirable Qualifications:

Ability to develop and maintain effective relationships internally and externally for successful on-going interaction; knowledge of planning work done by Caltrans and its role in providing an effective multi-modal transportation system; multi-disciplinary project management experience; strong interpersonal and presentation skills; ability to develop innovative and effective solutions for transportation problems and effectively implement them; grant writing experience.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Investment strategies are the basis for the short, medium, and long-range planning of the entire statewide transportation system. It includes assessing and identifying improvements for a variety of important elements including system operations and management, sustainable planning, addressing climate change, complete streets, and others. Errors in guidance, implementation, coordination, and carrying out Federal and State laws and regulations related to the previously identified system planning responsibilities could have negative impacts. Consequences of errors could lead to Districts not having sufficient information to make informed decisions on investment strategies and funding programs. Errors in guidance, implementation, coordination, and carrying out state and federal law, regulations, and policies could have negative impacts on the Department's ability to fund and provide safe, equitable, sustainable, and multi-modal options to the traveling public.

Failing to meet deadlines could result in impacts to the Department's credibility and ability to fund and deliver projects according to project and stakeholder commitments.

PUBLIC AND INTERNAL CONTACTS

Routine internal contacts with the Director's Office, HQ and District management, HQ programs and divisions (DOTP Offices, HQ Divisions of Traffic Operations, Financial Programming, Research, Innovation and System Information; Rail and Mass Transportation, etc.), California Transportation Commission staff, Federal Liaison, CalSTA, and others. Frequent involvement with District divisions/programs (Planning, Programming, Project Management, etc.), Metropolitan Planning Organizations and Regional Transportation Planning Agencies. Contact with USDOT and Federal Highway Administration are less frequent but will occur.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Develop and maintain cooperative working relationships. Deal effectively with pressure; maintain focus and intensity yet remain optimistic and persistent, even under adversity. Create a work environment that encourages creative thinking and innovation. Enable others to acquire tools and support they need to perform well. Develop new insights into situations and apply innovative solutions to make organizational improvements. Create and sustain an organizational culture, which encourages others to provide the quality of service essential to high performance and productivity. The incumbent must act in a fair and ethical manner, demonstrate commitment to public service, develop organizational improvements, foster a creative and innovative work environment, be willing to take intelligent risks, and value equity and diversity in the workforce. Adjust rapidly to new situations warranting attention and resolution.

WORK ENVIRONMENT

The incumbent works in front of a dual-monitor computer system under artificial light in an office setting with long periods of working in a sitting or standing position.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans 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.

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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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