

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Sr Transportation Planner	OFFICE/BRANCH/SECTION District 8 / Division of Transportation Planning	
WORKING TITLE Branch Chief, Office of System Planning	POSITION NUMBER 908-802-4724-002	REVISION DATE 09/28/2026

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

GENERAL STATEMENT:

Under the general direction of the Supervising Transportation Planner, the Senior Transportation Planner handles diverse, complex and sensitive transportation planning issues in the areas of Multimodal System Planning, Goods Movement, and other relevant subject areas, as it pertains to planning for a holistic, integrated and sustainable transportation system. The Senior Transportation Planner leads a team to conduct multimodal corridor planning; advocate for project improvements aligned with priorities and goals in the Caltrans Strategic Plan and other statewide modal plans; strengthen and leverage partnerships with internal and external stakeholders; and provide sound recommendations throughout the project planning and development process.

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.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Equity, Prosperity, Employee Excellence - Collaboration, Innovation, People First)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Equity, Prosperity - Integrity)
- **Continuous Professional Development:** Seeks to obtain knowledge and improve performance while supporting others in doing the same. (Equity, Climate Action, Prosperity - Equity, Innovation)
- **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 - Collaboration, Innovation, Integrity)
- **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, People First)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Safety, Equity, Climate Action, Prosperity - Equity, Stewardship)
- **Influencing Others:** The ability to gain the support of others for ideas, proposals, projects and solutions. (Equity, Prosperity - Equity, Stewardship)
- **Vision and Strategic Thinking:** Communicates the "big picture". Models the department's Vision and Mission to others. Influences others to translate vision into action. Future oriented, and creates competitive and break through strategies and plans. (Equity, Prosperity - Collaboration, Equity, People First)
- **Managing Performance:** Responsible for employee performance, setting clear goals and expectations, tracking progress against departmental and unit goals, providing feedback, and addressing performance issues promptly. (Employee Excellence - Collaboration, Integrity, People First)

TYPICAL DUTIES:

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

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40%	E	Hire, train, mentor and supervise a team of Transportation Planners, Associate Transportation Planners, and Landscape Associates. Manage and assign workload and projects, review completed staff work, and provide guidance to staff. Prepare probationary reports and annual performance evaluations. Encourage the professional development and continual learning of employees, and ensure staff have access to the necessary tools, training, and resources to be effective in their jobs. Manage and lead the System Planning program by overseeing comprehensive multi-modal corridor planning efforts and analyses in alignment with statewide guidelines and key emphasis areas such as Active Transportation, Freight and Goods Movement, Rail and Transit Connectivity, Environmental Linkages, Livability, Equity, Zero Emission Vehicles, Sustainability, and Technology. Communicate a strategic vision and sound recommendations to help guide the district's improvement projects utilizing available data, plans, studies, innovative initiatives, understanding of transportation funding, and other pertinent considerations.
25%	E	Advocate for the public and local communities within project nomination, development, and delivery processes. Support and motivate technical staff to promote multimodality, safety for all users, equity, and strategic risk-taking within project teams. Oversee the development of Transportation Planning Scoping Information Sheets by staff and leverage such tools to influence project scope of work to include Complete Streets elements that meet overarching departmental goals. Collaborate closely with the Complete Streets Coordinator in project development activities relating to Asset Management, Pre-Programming Engineering Studies, and Complete Streets Decision Document. Work with appropriate functional units and offices to promote project alignment with statewide direction pertaining to Complete Streets, Engagement, Equity, and other key priority goals as defined in the Strategic Plan and other statewide vision setting documents.
15%	E	Participate on various statewide, interregional, district, and local planning efforts to advocate for projects and strategies consistent with the Caltrans Strategic Plan, California Transportation Plan, California Climate Action Plan for Transportation Infrastructure and district/state modal plans. Strengthen and leverage partnerships to collaboratively achieve common goals for the region and build strong working relationships with partners through planning activities.
10%	E	Represent the District at various meetings, conferences, and public events that may require travel. Participate in a diverse range of department-wide or district-wide activities and special assignments that support advancements in innovation, multimodality, equity, and customer service as it aligns with the Mission, Vision, and Strategic Plan Goals
10%	M	Seek opportunities for continual learning, improvement, and professional growth through formal and informal methods of training, mentoring, coaching, on-the-job learning, researching, reading, and special assignments or committees. 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

Provides supervision for rank and file staff which may include Transportation Planners, Associate Transportation Planners, and Landscape Associates.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of multimodal planning, project development, and funding methods; principles and techniques of supervision and personnel management; legal requirements relating to transportation planning; including appropriate theories, principles, concepts, laws, rules, policies, vocabulary and terminology associated with the operation of the planning program; and supervisor's role in meeting the objective of the equal employment opportunity, health and safety, and labor relations programs. Have a strong understanding of planning issues and concepts such as livable communities, complete streets, equity, public and community engagement, transportation funding, and opportunities through advanced technology and sustainability.

Ability to:
Recognize evolving issues in system planning and evaluate plans in relation to statewide interests; comprehend and communicate transportation planning information and perspectives to management in a clear and concise manner; conduct effective written and oral presentations; handle and respond to correspondence of a sensitive nature, manage branch personnel efficiently and adequately; effectively contribute to the Department's equal employment opportunity objectives.

Additional Desirable Qualifications:
Ability to develop and maintain effective relationships both internally and with other agencies and private sector for successful ongoing interaction; knowledge of planning work done by Caltrans at all levels and its role in providing an effective multi-modal

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transportation system. Collaboration and representation: ability to generate enthusiasm for the organization, elicit cooperation, and get information. Ability to work independently and as part of a team; outstanding organizational skills, attention to detail, and takes initiative. Excellent written and verbal communication skills. Resourceful, professional with the ability to set priorities, delegate, manage time, and leverage limited resources.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

This position has a major responsibility for helping to ensure the principles and practices of the State Planning Program are carried out in accordance with the Department's mission and Federal and State laws. Failure could result in delay or significant loss of valuable planning time or denial of State and Federal funding for transportation programs and projects.

PUBLIC AND INTERNAL CONTACTS

Independently, and in consultation with the Office Chief for Modal Planning Programs and Deputy Director for Planning and Local Assistance, confers with staff in the District and outside agencies, developers, consultants, and the general public in the daily operations of the branch. Responsible for representing the District in transportation planning and administrative activities under the Incumbents' control and providing support where necessary. The Senior Transportation Planner represent the District to local, regional, state and federal agencies, Headquarters functional managers, and other private and public sector agencies. The Incumbent acts as a resource person for the Office Chief for Modal Planning Programs and the Deputy Director for Planning and Local Assistance.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

This position requires sufficient manual dexterity to operate a computer keyboard; the ability to sit for long periods; the ability to develop and maintain cooperative relationships; the ability to focus on difficult tasks for long periods of time. May occasionally require lifting large or heavy objects within work environment, such as printer paper, large reports, and computer equipment. Requires occasional bending, stooping, and kneeling. The ability to multi-task, to adapt to changes in priorities, and to complete tasks or projects on short notice. The Division requires interaction with many people. It is important that employees work with others in a cooperative manner; adjust rapidly to new situations, which warrant attention and resolution; behave in a fair and ethical manner toward others; and demonstrate a sense of responsibility and commitment to public service. Creates and sustains an organizational culture which encourages others to provide the quality of service essential to high performance. The ability to deal effectively with pressure and maintain focus yet remain optimistic and persistent even under adversity.

WORK ENVIRONMENT

While at his/her base of operation, employee will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. Employee may work at workstations within shared cubicles. Employee may occasionally be required to travel for meetings and trainings, as well as conduct field visits. 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.

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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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