

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Associate Transportation Planner	Office of Project Initiation/PID Workload Management Branch	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Project Initiation Document Program (PID) Liaison	900-074-4721-XXX	10/14/2026

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

GENERAL STATEMENT:

Under direction of the PID Workload Management Branch Chief, a Senior Transportation Planner, the Associate Transportation Planner serves as a technical Planning program liaison within the Office of Project Initiation (OPI). The incumbent supports the Project Initiation Document (PID) Program, a core Planning function that plays a key role in Caltrans' project development process. This program guides the development of transportation project studies (PIDs) which result in candidate transportation projects eligible for programming in the State Transportation Improvement Program (STIP), State Highway Operations and Protection Program (SHOPP), and other local, regional, state, or federal discretionary funding programs. The incumbent serves as the technical planning liaison to assigned districts for the PID Program, oversees journey-level staff assignments of average to higher difficulty.

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 - Innovation, Stewardship)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - People First, 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 - 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. (Prosperity - Integrity, People First)
- **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 - Collaboration, Innovation, Pride)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Collaboration, Integrity, 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)
- **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. (Prosperity - Innovation, Stewardship)
- **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 - Integrity, Pride, Stewardship)

TYPICAL DUTIES:

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

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

40%	E	Evaluate and communicate PID Program procedures, policies, and workload expectations to district staff engaged in developing transportation project studies (PIDs). Coordinate with district PID staff to develop and maintain accurate PID workload and expenditure data, ensuring consistency with statewide planning priorities and transportation infrastructure funding cycles. Support annual and multi-year workload planning by collaborating with district and Headquarters (HQ) PID staff to validate resource needs, align projects with funding constraints, and prioritize PIDs for development. Review PID data and monitor the development of transportation projects eligible for programming in the STIP, SHOPP, and other discretionary funding programs. Provide technical review and guidance on project resource requests and workload modifications. Support statewide workload management by analyzing proposed transportation planning policy changes and recommending strategies to enhance data quality, streamline processes, and resolve program delivery challenges. May perform or contribute to transportation planning assignments of average to higher difficulty outside of OPI to support PID Program objectives as needed.
30%	E	Coordinate the collection, validation, and maintenance of PID workload data across assigned districts. Lead the development and implementation of analytical tools, procedures, and guidance to promote program transparency and support effective workload management and administration of program funds. Compile, analyze, and interpret workload and expenditure data for current, historical, and future fiscal year transportation project studies (PIDs). Prepare data summaries and reports to support internal decision-making and fulfill external reporting requirements including Budget Change Proposals, Finance Letters, District Transportation Planning Funding Agreements, and other deliverables. Identify statistical trends and program performance insights to inform statewide project delivery and resource planning. Prepare scheduled and ad hoc reports for oversight and control agencies such as the State Transportation Agency (CalSTA), Legislative Analyst's Office (LAO), and Department of Finance (DOF) to enhance program transparency and demonstrate effectiveness.
25%	E	Lead the development and maintenance of technical guidance, standard procedures, and tools that support core PID Program functions, including PID workload planning and prioritization, external reporting, and data management protocols. Independently conduct research and data analysis to evaluate PID Program performance, identify areas for improvement, and recommend strategies to the Branch Chief and Office Chief. Propose and implement improvements that address data integrity issues, promote consistency with statewide planning priorities, and enhance overall program efficiency. Represent the PID Program on interdisciplinary and cross-functional teams focused on continuous process improvement, data governance, and performance management initiatives within and outside of the Division of Transportation Planning. Ensure that program procedures and practices align with statewide transportation policy goals and support the development of transportation projects with reliable scope, schedule, and cost estimates. Prepare a wide range of technical and analytical materials in support of the PID Program, including policy memoranda, data summaries, dashboards, guidance documents, fact sheets, legislative analyses, and issue briefs. Draft internal and external communications that support program transparency, inform decision-making, and meet reporting requirements for internal leadership, district offices, and external oversight agencies. Ensure all materials are accurate, data-informed, and aligned with transportation planning policy goals and objectives. Support strategic planning and program performance evaluation by developing clear, accessible documentation that effectively communicates complex planning and workload management concepts to diverse audiences.
5%	M	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

This position is non-supervisory, but may provide technical guidance to entry-level PID liaisons in a learner capacity.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

This role requires a strong understanding of transportation planning policies, transportation infrastructure funding mechanisms, and multi-modal transportation system needs.

This position requires the incumbent to understand and be able to articulate, both verbally and in writing, research and analysis

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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 3) legislative processes, 4) roles and responsibilities of the Federal, State and Regional governments in providing transportation planning services, 5) current departmental policies and programs, and 6) be generally well-versed in various social, economic, environmental, transportation, and land use factors that may impact how and when a project is scoped and initiated.

Excellent proficiency in spreadsheet applications is desired. Experience with relational database applications, concepts, and data analysis is highly desirable. 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. Be able to produce completed staff work and communicate effectively both verbally and in writing. Have 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. 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 will 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.

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. 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. 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

The incumbent works in a typical florescent-lighted, climate-controlled, office environment. The incumbent must operate usual office equipment.

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.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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

CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION Office of Project Initiation/PID Workload Management Branch	
WORKING TITLE Project Initiation Document Program (PID) Liaison	POSITION NUMBER 900-074-4768-XXX	REVISION DATE 10/14/2026

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

GENERAL STATEMENT:

Under supervision of the PID Workload Management Branch Chief, a Senior Transportation Planner, or with guidance from a journey-level PID Liaison, the Transportation Planner serves as a technical Planning program liaison, initially in a learner capacity, with less complex planning assignments within the Office of Project Initiation (OPI). The incumbent supports the Project Initiation Document (PID) Program, a core Planning function that plays a key role in Caltrans' project development process. This program guides the development of transportation project studies (PIDs) which result in candidate transportation projects eligible for programming in the State Transportation Improvement Program (STIP), State Highway Operations and Protection Program (SHOPP), and other local, regional, state, or federal discretionary funding programs. The incumbent serves as the technical planning liaison to assigned districts for the PID Program, managing staff assignments of average difficulty.

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.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (Prosperity - Innovation, Stewardship)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Employee Excellence - People First, 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 - 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. (Prosperity - Integrity, People First)
- **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 - Collaboration, People First)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Collaboration, Integrity, 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)
- **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. (Prosperity - Innovation, Stewardship)
- **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 - Integrity, Pride, Stewardship)

TYPICAL DUTIES:

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

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

40%	E	Evaluate and communicate PID Program procedures, policies, and workload expectations to district staff engaged in developing transportation project studies (PIDs). Coordinate with district PID staff to develop and maintain accurate PID workload and expenditure data, ensuring consistency with statewide planning priorities and transportation infrastructure funding cycles. Support annual and multi-year workload planning by collaborating with district and Headquarters (HQ) PID staff to validate resource needs, align projects with funding constraints, and prioritize PIDs for development. Review PID data and monitor the development of transportation projects eligible for programming in the STIP, SHOPP, and other discretionary funding programs. Provide technical review and guidance on project resource requests and workload modifications. Support statewide workload management by analyzing proposed transportation planning policy changes and recommending strategies to enhance data quality, streamline processes, and resolve program delivery challenges. May contribute to transportation planning assignments of average difficulty outside of OPI to support PID Program objectives as needed.
30%	E	Coordinate the collection, validation, and maintenance of PID workload data across assigned districts. Assist in the development and implementation of analytical tools, procedures, and guidance to promote program transparency and support effective workload management and administration of program funds. Compile, analyze, and interpret workload and expenditure data for current, historical, and future fiscal year transportation project studies (PIDs). Prepare data summaries and reports to support internal decision-making and fulfill external reporting requirements including Budget Change Proposals, Finance Letters, District Transportation Planning Funding Agreements, and other deliverables. Identify statistical trends and program performance insights to inform statewide project delivery and resource planning. Assist in the preparation of scheduled and ad hoc reports for oversight and control agencies such as the State Transportation Agency (CalSTA), Legislative Analyst's Office (LAO), and Department of Finance (DOF) to enhance program transparency and demonstrate effectiveness.
25%	E	Develop and maintain technical guidance, standard procedures, and tools that support core PID Program functions, including PID workload planning and prioritization, external reporting, and data management protocols. Conduct research and data analysis to evaluate PID Program performance. Assist with identifying areas for improvement and recommending strategies to the Branch Chief and Office Chief. Assist with proposing and implementing improvements that address data integrity issues, promote consistency with statewide planning priorities, and enhance overall program efficiency. Ensure that program procedures and practices align with statewide transportation policy goals and support the development of transportation projects with reliable scope, schedule, and cost estimates.
		Prepare a wide range of technical and analytical materials in support of the PID Program, including policy memorandum, data summaries, dashboards, guidance documents, fact sheets, legislative analyses, and issue briefs. Draft internal and external communications that support program transparency, inform decision-making, and meet reporting requirements for internal leadership, district offices, and external oversight agencies. Ensure all materials are accurate, data-informed, and aligned with transportation planning policy goals and objectives. Support strategic planning and program performance evaluation by developing clear, accessible documentation that effectively communicates complex planning and workload management concepts to diverse audiences. May represent the PID Program on interdisciplinary and cross-functional teams focused on continuous process improvement, data governance, and performance management initiatives within and outside of the Division of Transportation Planning.
5%	M	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
This position is non-supervisory.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
This role requires a basic understanding of transportation planning policies, transportation infrastructure funding mechanisms, and multi-modal transportation system needs.

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,

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

process, procedural practices and legal requirements of transportation planning and programming, 2) principles of project development 3) legislative processes, 4) roles and responsibilities of the Federal, State and Regional governments in providing transportation planning services, 5) current departmental policies and programs, and 6) be generally well-versed in various social, economic, environmental, transportation, and land use factors that may impact how and when a project is scoped and initiated.

Proficiency in spreadsheet applications is required. Experience with relational database applications, concepts, and data analysis is highly desirable. 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. Be able to produce completed staff work and communicate effectively both verbally and in writing. Have 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. 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 will 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.

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. 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. 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

The incumbent works in a typical florescent-lighted, climate-controlled, office environment. The incumbent must operate usual office equipment.

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.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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
------------------------	------