

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION Transit Grants and Contracts / Specialized Transit Branch	
WORKING TITLE Associate Transportation Planner	POSITION NUMBER 900-064-4721-919	REVISION DATE 10/15/2026

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 a Senior Transportation Planner (Branch Chief), in the Office of Transit Grants and Contracts, the incumbent works on the Federal Transit Administration (FTA) Grant Programs administered by the California Department of Transportation (Caltrans). To meet California's public transportation needs, the FTA Section 5310 (Enhanced Mobility of Seniors & Individuals with Disabilities) program provides operating assistance, mobility management, vehicle and equipment grants to non-profit organizations and public agencies to support mobility options for seniors and individuals with disabilities.

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. (Employee Excellence - Innovation)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Prosperity - Collaboration)
- **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. (Equity - Integrity)
- **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 - Innovation)
- **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 - Pride, Stewardship)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Integrity, People First, 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)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Prosperity - Innovation, Stewardship)
- **Organizational Skills:** Keeps work prioritized and organized. Logically approaches situations. (Employee Excellence - Innovation, Integrity)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	
35% E	Independently monitors FTA 5310 projects for compliance with program requirements. Provides expert assistance in grant applications, administration and contract management. Acts as a liaison to grant applicants and subrecipients for grant administration.
25% E	Leads federal program asset management of vehicles and equipment through an on-line database. Assets management requires monitoring and tracking vehicle inventories and releasing vehicles once useful life or mileage standards have been met. Requires coordination with grant recipients and the Department of Motor Vehicles.

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15%	E	Collaborates independently in a lead capacity with other branches within the office to promote cross training and a thorough understanding of federal and state funded transit. Cross trained amongst the FTA grant programs including FTA 5310, FTA 5311, FTA 5339, the Grants Management Branch and other roles and to provide support and flexibility of the grant funding programs.
10%	E	Maintains, coordinates and updates agency monitoring forms and monitoring schedules to ensure maximum efficiency to our grant recipients, District Transit Representatives and the grant programs. This includes leading compliance for bi-annual reporting, FTA and National Transit Database requirements.
10%	E	Independently develops and maintains program fact sheets and other materials to highlight grant program success and the impacts of transit across California.
5%	M	Performs 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

N/A

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Familiarity of federal and state laws relating to transportation planning and the funding of transit programs.

The ability to work with others as a team member; to communicate effectively, both orally and in writing.

The ability to perceive needs and recognize problems in the broad area of mass transportation financing and monitoring, and establish a course of action which leads to successful solutions for the Department and our customers.

The ability to analyze federal and state regulations and laws which impact the federal grant programs.

Knowledge of the Department's mission, organization, policies, and procedures; Federal and State laws and regulations; concepts and terminology relating to transportation planning; sources of funding transportation programs.

To understand responsibility for a broad range of tasks for an assigned functional or geographical area that applies to established procedures and program guidance.

The ability to gather, compile, and extrapolate data using a computer; read and interpret financial statements and audit reports; and to establish and maintain effective cooperative relations with others. The ability conduct studies related to State transportation planning; analyze problems and develop appropriate solutions; recommend effective courses of action; evaluate general planning proposals.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Consequences of error can be serious and far-reaching, affecting the Department but also regional transportation planning agencies, transit operators and transit service providers. The incumbent is frequently responsible for making recommendations on politically sensitive issues, on new administrative regulations and resolution of disputes brought about in the implementation of the program.

PUBLIC AND INTERNAL CONTACTS

Has a wide variety of regular contacts with persons outside the Division of Mass Transportation, by telephone, in writing, and in person, and the most frequently contacts with the Headquarters staff engaged in the federal grant programs. Other regular contacts include district staff; staff from the Los Angeles regional office of FTA; and staff from other Caltrans Headquarters programs, including Accounting and Administrative Services (Contracts and Audits). Incumbent will have direct contact with staff of regional and local agencies, non-profit organizations and other stakeholders regarding the federal grant programs.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The ability to develop and maintain cooperative relationships. The ability to stay in the stationary position for long durations and perform tasks utilizing a PC. The ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. The ability to concentrate in order to review and create documents and meet strict deadlines at times. Open to change and new information; adapts behavior and work methods in response to new information, changing conditions, or unexpected obstacles.

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'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 headquarterd location as needed to meet operational needs. Business travel may be required, and reimbursement considers an employee's designated headquarterd location, primary I have read, understand and can perform the duties listed above. (If you believe you may require

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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.

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

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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. (Equity - People First)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Prosperity - Collaboration)
- **Ethics and Integrity:** Demonstrated concern to be perceived as responsible, reliable, and trustworthy. Respects the confidentiality of information or concern shared by others. Honest and forthright. Conforms to accepted standards of conduct. (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. (Equity - 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)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Collaboration)
- **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 - People First)
- **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 - 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 - Integrity)

TYPICAL DUTIES:

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35% E	Helps monitor FTA 5310 projects for compliance with program requirements. Provides assistance in grant applications, administration and contract management. Acts as a liaison to grant applicants and subrecipients for grant administration.
25% E	Assists with federal program asset management of vehicles and equipment through an on-line database. Asset management requires monitoring and tracking vehicle inventories and releasing vehicles once useful life or mileage standards have been met. Coordinates with grant recipients and the Department of Motor Vehicles.

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10%	E	Helps maintain, coordination and updates to agency monitoring forms and monitoring schedules to ensure maximum efficiency to our grant recipients, District Transit Representatives and the grant programs. This includes assisting with compliance for bi-annual reporting, FTA and National Transit Database requirements.
10%	E	Helps create and distribute program fact sheets and other promotional materials to highlight grant program success and the impacts of transit across California.
5%	M	Miscellaneous duties and tasks actions as deemed necessary in order to maintain compliance with program requirements.

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SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

N/A

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Familiarity of federal and state laws relating to transportation planning and the funding of transit programs.

The ability to work with others as a team member; to communicate effectively, both orally and in writing.

The ability to perceive needs and recognize problems in the broad area of mass transportation financing and monitoring, and establish a course of action which leads to successful solutions for the Department and our customers.

The ability to analyze federal and state regulations and laws which impact the federal grant programs.

Knowledge of the Department's mission, organization, policies, and procedures; Federal and State laws and regulations; concepts and terminology relating to transportation planning; sources of funding transportation programs.

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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. Employee may be required to travel. May need to extend day to complete vital projects.

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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