STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Associate Transportation Planner	District 09 - Planning and Local Assistance	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Associate Transportation Planner	909-325-4721-xxx	10-20-26

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

GENERAL STATEMENT:

In District 9's Office of Planning and Local Assistance, the Associate Transportation Planner (ATP) works at the journey level under the direction of a Senior Environmental Scientist (Supervisor) Branch Chief. The incumbent will function as an interdisciplinary team member at full journey person level. Incumbent will work independently to perform difficult and complex planning work to plan, develop, organize, and direct activities which integrate various social, economic, environmental, transportation, and land use factors to support implementation of a balanced State transportation program. The incumbent will plan, develop, administer, evaluate, and monitor transportation plans, programs, and projects in the transportation planning process and may serve in lead capacity. This may include but not be limited to: local assistance, regional planning, multi modal system planning, community planning, state planning, freight planning, active transportation, health, climate change, air quality, program project planning, strategic investment planning, local development review, modeling, geospatial data analysis, and economics.

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.

- **Flexibility and Managing Uncertainty :** Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (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. (Equity - 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 - 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. (Prosperity - Stewardship)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Equity - Collaboration)
- **Organizational Awareness:** Contributes to the organization by understanding and aligning actions with the organization's strategic plan, including the mission, vision, goals, core functions, and values. (Employee Excellence - 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. (Equity - Collaboration)
- **Forward Thinking:** Anticipates the implications and consequences of situations and takes appropriate actions to be prepared for possible contingencies. Anticipates and prepares for future developments. (Employee Excellence - Innovation)
- **Commitment/Results Oriented:** Dedicated to public service and strives for excellence and customer satisfaction. Ensures results in their organization. (Employee Excellence - Pride)

TYPICAL DUTIES:

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

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45%	E	Acts as a program/project management advisor for city and county programmed local system transportation projects administered through District 9, Office of Local Assistance. Funding programs include STIP, HBP, HSIP, Emergency Relief (ER), CMAQ, RSTP, and ATP. Analyzes, interprets and implements Federal and State rules and regulations mandated by the Federal Highway Administration (FHWA) and Caltrans Division of Local Assistance. Coordinates Caltrans oversight role for key project deliveries and milestones (i.e. NEPA clearance, Right of Way Certification, Project Allocation, Project Authorization, Contract award, Construction inspection, etc.). Maintains District Local Assistance databases (i.e. LP2000, FADS, FileMaker Pro, etc.) to accurately reflect project status and delivery information. Performs invoice review, Federal compliance reviews, and assists HQ with project application solicitation. Provides local agencies with a high level of customer service, which includes: trainings, clear communication, interpretation of rules and regulations, traveling to remote locations for field reviews, and documentation review.
20%	E	Multi-Modal, System, Freight Planning, and State Planning Prepare System Planning products, including but not limited to Comprehensive Multimodal Corridor Plans and District System Management Plan and Project List. Develop and lead pertinent State Planning & Research studies. Facilitate engagement with and collect comments from stakeholders as appropriate throughout document preparation. Work with Caltrans functional units and local partners to: research multi-modal deficiencies and identify conceptual alternatives, conduct investigations, analyze socio-economic and land use impacts, recommend complete streets improvements, and prepare reports/presentations reflecting current and future conditions of the State Highway System (SHS). Support identification, communication, and documentation of needs via Project Initiation Documents, Transportation Planning Scoping Information Sheets, Complete Streets Decision Document, Project Delivery Team meetings, and public engagement. Act as liaison with HQ for Active Transportation, Multi-modal, and/or Complete Streets programs. Interact with Caltrans district and HQ staff, stakeholders, and freight advisory groups regarding freight mobility on the SHS and document issues/recommendations in statewide and regional planning documents. Prepare and submit a quarterly freight report to HQ documenting district workload products/activities.
20%	E	Regional, Smart Mobility, Climate Change, and Strategic Investment Planning Interact with Regional Transportation Planning Agencies (RTPAs) and/or Metropolitan Planning Organization (MPO) to review and guide the development of various regional transportation planning documents, including the Regional Transportation Improvement Program (RTIP), Overall Work Program (OWP), and Regional Transportation Plan (RTP). As a District liaison, attend, and make presentations at the Local Transportation Commission (LTC) and/or Council of Government (COG) meetings. Prepare summary for management of Caltrans-related LTC/COG agenda items. Research/follow-up on questions, actions, or items requested of Caltrans. Review subsequent meeting minutes for accuracy, notifying management and others accordingly. Work with local agency planning commissions and planning departments on regional and community planning activities. Attend advisory committee meetings, scoping meetings, public hearings, and other related events. Review, administer, and monitor the use of State and Federal planning funds to the RTPAs and MPO, including amendments. Write, review and guide the development of grant applications and their associated funding plans and programs in their support of Caltrans and partnering agencies' goals. Administer planning grants awarded and consult with awardees.
10%	E	Represent Planning at various internal and external meetings. Deliver oral presentations, facilitate meetings, and scribe meeting notes. Create, use, and/or maintain Planning related data.
5%	M	Other duties as assigned within the specification of the classification.

[1]ESSENTIAL 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
None

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
The incumbent must be knowledgeable about public transportation systems and able to gather, compile, analyze, and interpret data relating to transportation systems to formulate recommendations for effective courses of action. He/she must be able to write clearly, concisely and professionally for the intended purpose. He/she must be able to produce deliverables and meet agreed upon project milestones. He/she must be able to use personal computer software for writing, graphics, presentations and spreadsheet analysis. He/she must have well-developed communication skills, and be able to work independently and with

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groups, as well as closely follow verbal and written instructions. He/she must have capability to learn specialized computer programs.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
The incumbent is expected to follow standardized practices and procedures and is responsible for the accurate, professional, and timely application of work plans. An error or invalid decision could result in unnecessary delays to the transportation planning process, failure to meet required deadlines, loss of funding opportunities, and damage to Caltrans' credibility.

PUBLIC AND INTERNAL CONTACTS
This position requires regular contact with public, private, and government stakeholders, as well as frequent contact with Caltrans personnel within the District, in other districts, and HQ. Interaction to disseminate information and/or explain programs, methodologies, legislation, processes, projects, etc. is necessary, both informally and during meetings.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS
The incumbent may be required to work under stressful situations, both inside and outside the office setting that require appropriate responses. He/she must accept personal responsibility for meeting delivery milestones and exercise sound, professional judgment and tact. He/she must report to work on time, treat others with respect, honesty, and fairness. He/she is also expected to be flexible since assignments, duties, and priorities can change over time. He/she must acquire and exercise knowledge of Caltrans' Safety Manual and safe practices. He/ she must be physically able to complete a variety of fieldwork and/ or surveys in various outdoor environments and weather.

WORK ENVIRONMENT
The incumbent will primarily work in a professional office setting that is climate controlled with both natural and artificial light. Some fieldwork may be required that will involve various terrain. He/she will attend off-site meetings, hearings, and training, which may include some overnight travel. Overtime may be required.

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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STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Transportation Planner	District 09 - Planning and Local Assistance	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Transportation Planner	909-325-4768-xxx	10/20/2026

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

GENERAL STATEMENT:

In District 9's Office of Planning and Local Assistance, the Transportation Planner (TP) works at the entry level under the direction of Senior Environmental Scientist (Supervisor) Branch Chief. The incumbent will function as an interdisciplinary team member. Incumbent will work perform work to assist to plan, develop, organize, and direct activities which integrate various social, economic, environmental, transportation, and land use factors to support implementation of a balanced State transportation program. The incumbent will help to plan, develop, administer, evaluate, and monitor transportation plans, programs, and projects in the transportation planning process. This may include but not be limited to: local assistance; regional planning, multi modal system planning, community planning, state planning, freight planning, active transportation, health, climate change, air quality, program project planning, strategic investment planning, local development review, modeling, geospatial data analysis, and economics.

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.

- **Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (Employee Excellence - Collaboration, 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. (Prosperity, Employee Excellence - 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 - 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 - Pride)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Equity, Prosperity - People First, 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. (Employee Excellence - Integrity, Pride)
- **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. (Equity, Employee Excellence - Innovation, Pride)
- **Commitment/Results Oriented:** Dedicated to public service and strives for excellence and customer satisfaction. Ensures results in their organization. (Prosperity - Pride)

TYPICAL DUTIES:

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

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45%	E	Assist the Branch Chief and other Staff with the city and county programmed local system transportation projects administered through District 9, Office of Local Assistance. Funding programs include STIP, HBP, HSIP, Emergency Relief (ER), CMAQ, RSTP, and ATP. Under direction, assists with analyzing, interpreting, and implementing Federal and State rules and regulations mandated by the Federal Highway Administration (FHWA) and Caltrans Division of Local Assistance. Learns and assists with the coordination of Caltrans oversight role for key project deliveries and milestones (i.e. NEPA clearance, Right of Way Certification, Project Allocation, Project Authorization, Contract award, Construction inspection, etc.). Assists with maintaining District Local Assistance databases (i.e. LP2000, FADS, FileMaker Pro, etc.) to accurately reflect project status and delivery information. Assists with invoice review, Federal compliance reviews, and assists HQ with project application solicitation. Provides local agencies with a high level of customer service, which includes: trainings, clear communication, interpretation of rules and regulations, raveling to remote locations for field reviews, and documentation review.
20%	E	Assist the Branch Chief and other Staff with Multi-Modal, System, Freight Planning, and State Planning. Assists with preparing System Planning products, including but not limited to Comprehensive Multimodal Corridor Plans and District System Management Plan and Project List. Helps to develop pertinent State Planning & Research studies. Facilitates engagement with and collect comments from stakeholders as appropriate throughout document preparation. Works with Caltrans functional units and local partners to: research multi-modal deficiencies and identify conceptual alternatives, conduct investigations, analyze socio-economic and land use impacts, recommend complete streets improvements, and prepare reports/ presentations reflecting current and future conditions of the State Highway System (SHS). Support identification, communication, and documentation of needs via Project Initiation Documents, Transportation Planning Scoping Information Sheets, Complete Streets Decision Document, Project Delivery Team meetings, and public engagement. Under direction, acts as liaison with HQ for Active Transportation, Multi-modal, and/or Complete Streets programs. Interacts with Caltrans district and HQ staff, stakeholders, and freight advisory groups regarding freight mobility on the SHS and document issues/recommendations in statewide and regional planning documents. Assists with preparing and submitting quarterly reports to HQ documenting district workload products/activities.
20%	E	Assist with Regional, Smart Mobility, Climate Change, Transit and Strategic Investment Planning. Interact with Regional Transportation Planning Agencies (RTPAs) and/or Metropolitan Planning Organization (MPO) to review and guide the development of various regional transportation planning documents, including the Regional Transportation Improvement Program (RTIP), Overall Work Program (OWP), and Regional Transportation Plan (RTP). As a District liaison, attend, and make presentations at the Local Transportation Commission (LTC) and/or Council of Government (COG) meetings. Prepare summary for management of Caltrans-related LTC/COG agenda items. Research/follow-up on questions, actions, or items requested of Caltrans. Review subsequent meeting minutes for accuracy, notifying management and others accordingly. Work with local agency planning commissions and planning departments on regional and community planning activities. Under direction, attends advisory committee meetings, scoping meetings, public hearings, and other related events. Review, administer, and monitor the use of State and Federal planning funds to the RTPAs and MPO, including amendments. In a learning capacity, write, review and guide the development of grant applications and their associated funding plans and programs, and assist in administering planning grants awarded and consult with awardees.
10%	E	Attend various internal and external meetings. Assist in the preparation of oral presentations, meeting facilitation, and scribe meeting notes. Create, use, and/or maintain Planning related data.
5%	M	Other duties as assigned within the specification of the classification.

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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

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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