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 - Transportation Planning	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Associate Transportation Planner	909-101-4721-921	10/15/2026

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 Transportation Planning Division, the Associate Transportation Planner (ATP) works at the journey level under the direction of the Deputy District 9 Director for Transportation Planning and Environmental Analysis. The incumbent performs a variety of analytical work as the Management Liaison in assisting the Deputy District Director for delivery of the program. The 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 and program project planning.

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. (Equity - Collaboration, Stewardship)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - People First)
- **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)
- **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/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Prosperity - Collaboration, Pride)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Equity - 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 - Collaboration, Stewardship)
- **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 - Integrity, Pride)
- **Commitment/Results Oriented:** Dedicated to public service and strives for excellence and customer satisfaction. Ensures results in their organization. (Equity - Equity, People First)

TYPICAL DUTIES:

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

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35%	E	Under the direction of the Deputy District Director for Planning and Environmental, in a learner capacity, the incumbent, an Associate Transportation Planner, will perform the less complex planning work in connection with programs related to Government-to-Government work in the district transportation planning program. The incumbent plans, develops, administers, evaluates, and monitors transportation plans, programs, and projects; prepares and supports system plans of transportation facilities and services including highways, public transportation, and non-motorized facilities; performs transportation studies for the development of transportation systems of all modes; participates in policy development and implementation; analyzes proposed policies from other government agencies; develops and analyzes legislation related to transportation; proposes, performs, and evaluates transportation planning research; monitors and certifies the transportation planning process for conformance with State and Federal requirements; provides transportation planning expertise to Federal, State, regional, local agencies, and transit operators to carry out the transportation planning process; develops, administers, and monitors consultant contracts and grant programs; promotes and supports alternative modes of transportation including public transportation and ride sharing; participates as a departmental representative on transportation planning issues at inter-or intradepartmental meetings and public or private meetings and hearings. In this position, the incumbent will lead work above specific to fostering Government to Government relationships by coordinating, facilitating, and engaging with local agencies in District 9.
20%	E	Develop, implement, and monitor stakeholder and public outreach and engagement for Caltrans plans and studies in a journey-level capacity (including difficult and complex engagement efforts). The incumbent will independently research and recommend appropriate engagement activities, identify key stakeholders, prepare outreach materials and presentations, and implement outreach activities. The incumbent will work with the District 9 Community Engagement Planning Coordinator, other District functional units and the Headquarters Division of Transportation Planning in the development of public engagement strategies and the implementation and monitoring of public engagement efforts. May involve participation in consultant-led outreach and engagement efforts which may also involve review and approval of consultant invoices and deliverables to ensure that scope of work tasks are being carried out properly and effectively. As needed, serve as a leadworker and/or lead the work of Transportation Planners in support of engagement activity development and implementation, as determined by the District Branch Chief.
20%	E	Work under the direction of the District Local Assistance Engineer (DLAE) and the Planning Manager to assist agencies, the District, and State to deliver state and federally funded locally-lead transportation projects. Follow state and federal laws, codes, guidance, policies and directives while coordinating and assisting local agencies with their transportation projects. Maintain and become proficient in Local Assistance and Planning filing systems, databases, and communication records to ensure proper documentation of project planning, funding, design, invoices, and archiving. Participate in audits to ensure Departmental compliance with local, federal, and state requirements.
20%	E	Participate in various activities for the Office, independently prepare activity reports, develop planning products, and attend meetings with local, regional and other state agencies on behalf of the Office when needed. 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.

[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. They 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. They must be able to use personal computer software for writing, graphics, presentations and spreadsheet analysis. The incumbent must have well-developed communication skills, and be able to work independently and with groups, as well as closely follow verbal and written instructions. They must have capability to learn specialized computer programs.

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POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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. They must accept personal responsibility for meeting delivery milestones and exercise sound, professional judgment and tact. They must report to work on time, treat others with respect, honesty, and fairness. They are also expected to be flexible since assignments, duties, and priorities can change over time. The incumbent 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. They 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 - Transportation Planning	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Transportation Planner	909-101-4768-921	11/06/2026

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 Transportation Planning Branch, the Transportation Planner (TP) works at the entry level under the direction of the Deputy District Director for Planning and Environmental. 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.

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25%	E	Assist the District Deputy Director, the Planning Manager, and the District Local Assistance Engineer (DLAE) 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, travel to remote locations, and documentation review.
25%	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.
25%	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.
20%	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 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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SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE

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