

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION State and Federal Transit Grants Branch	
WORKING TITLE Transportation Planner	POSITION NUMBER 904-111-4768-xxx	EFFECTIVE DATE September 2014

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

GENERAL STATEMENT:

Under the direction of the Chief, State and Federal Transit Grants Branch, or an Associate Transportation Planner acting in a lead capacity, the Transportation Planner assists in the administration of State funded transit capital grants funded from the State Transportation improvement Program (STIP), bond funding and other state sources. The incumbent will occasionally assist with the administration of the Federal Transit Administration Section 5311 Program. State and Federal Grant recipients are public agencies.

TYPICAL DUTIES:

Percentage		Job Description
30%	E	Allocation assistance and evaluation. The incumbent participates in gathering and evaluating information to be used in obtaining California Transportation Commission (CTC) allocation of programmed funds to local agencies. The incumbent also assists local agencies by preparing requests for reprogramming (STIP Amendments). The incumbent works with the Branch Chief, lead, and Headquarters personnel to assure that all information is provided in the format required for CTC action. The incumbent prepares briefing materials for the District 4 Director.
25%	E	Contract preparation. The incumbent assists in the preparation and processing of Master Agreements, Program Supplements and Amendments, and other documents as necessary to implement CTC approved funding and actions. Incumbent ensures that local agency submitted information complies with CTC resolutions and policies, as well as policies and contractual requirements of the Department.
25%	E	Progress payment request processing. The incumbent reviews requests from recipient agencies for progress payments as frequently as monthly for each Program Supplement assigned and recommends approval of invoices by the Branch Chief. Incumbent is responsible for assuring that progress payment requests submitted are complete, include only allowable costs in accordance with all reimbursement and financial guidelines set forth by Caltrans and the CTC, and are consistent with the provisions of the agreement. Invoices must be processed in a timely manner to avoid penalties and interest charges.
10%	E	Administration of District's FTA Section 5311 Grant Program. Following guidance from HQ Division of Rail and Mass Transportation and the Branch Chief, the incumbent will ensure reporting requirements for vehicles, equipment and transit projects are complete and submitted on time. This will include physical inspection of vehicles and equipment at off-site locations in District 4. The incumbent will also process applications, subsequent agreements and invoices, monitor progress and time schedule for each grant recipient, and administer the closeout of each grant when appropriate.
10%	M	The incumbent is responsible for obtaining quarterly reports from local agencies and providing accurate and timely reports to management, Headquarters, and CTC staff concerning the status of grant applications, allocations, project progress, and expenditure of funds. The incumbent participates in field reviews of projects and final field examinations to allow closeout of agreements. The incumbent may participate in District or Headquarters workshops to brief potential applicants on funding procedures.

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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

None

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Under the direction of the Branch Chief and/or lead, incumbent evaluates project financial information; reviews and evaluates invoice submittals; interprets program requirements and procedures as they relate to individual project needs; represents and discusses project information with District and Headquarters personnel. Incumbent is responsible for reviewing information with lead and the Branch Chief where needed to assure consistency with policy and established practice.

The incumbent must have the ability to communicate effectively in writing. The incumbent must also have knowledge of the planning process and general practices of transportation planning, familiarity with the concepts and terminology relating to transportation planning, and sources of funding for transportation programs. Knowledge of Federal and State laws and regulations relating to transportation planning is required, including a general awareness of the requirements of the California Environmental Quality Act and the National Environmental Policy Act. The incumbent must be able to assist in studies related to transportation planning, analyze problems and develop appropriate solutions, recommend effective courses of action and evaluate general planning proposals.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for assigned work and decisions required to ensure that the assigned work is completed in a timely basis. Decisions are reviewed by the Branch Chief at significant stages of work progress. Occasionally, the incumbent must make decisions more appropriately made by a supervisor. These situations are where indecision for a short period might be more objectionable than an incorrect decision made immediately. The employee's judgement is the critical factor. An incorrect decision could reflect adversely on the Department and delay the approval of funding for or timely payment of transit grants.

The incumbent must exercise tact and discretion in daily communications (oral, written, electronic, etc.) with external agencies and the public. A failure to do so, could reflect poorly on the Department.

PUBLIC AND INTERNAL CONTACTS

The position requires frequent written communication with external agencies as well as internal contacts. Incumbent has frequent contacts with others in the Department, occasionally up to the Office Chief level. Staff members of other agencies are contacted to receive or give information on projects and programs. Incumbent may be directed to contact transit operators, cities, counties, other state and federal agencies, local transportation agencies, and regional transportation agencies.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Awareness and sensitivity to social, economic and environmental conditions that affect transportation planning; the ability to inspire the confidence of partners; and the ability to further the recognition of Caltrans as a multi modal transportation organization.

WORK ENVIRONMENT

Attendance is an essential function of the job. Occasionally, extra hours may be required for unusual demands, e.g., shortage of help, reports due, public meeting times, or evaluation of project sites. District-wide and Statewide travel may be required for meetings and training, including long distance travel requiring overnight stays (estimated at two times per year).

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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.)

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