

POSITION DUTY STATEMENT

PM-0924 (REV 06/2013)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Transportation Planner	D10, Programming and Project Management, PPDSU	
WORKING TITLE	POSITION NUMBER	EFFECTIVE DATE
NON-SHOPP Program Liaison/Programming Oversight	910-100-4721-XXX	

As a valued member of the Caltrans team, you make it possible for the Department to improve the mobility across California by being innovative and flexible; reporting to work as scheduled; working cooperatively with team members and others; and treating others fairly, honestly and with respect. Your efforts are important to each member of the team as well as those we serve.

GENERAL STATEMENT: (BRIEF SUMMARY OF THE MAIN PURPOSE AND FUNCTIONS OF THE POSITION. DESCRIBE THE SUPERVISORY RELATIONSHIPS INCLUDING THE CLASSIFICATION OF THE SUPERVISOR OR MANAGER TO WHOM THE INCUMBENT REPORTS. WHEN APPROPRIATE, IDENTIFY THE NEED FOR ANY CREDENTIAL OR LICENSE SUCH AS A DRIVERS' LICENSE.)

Under the direction of the Branch Chief, Programming and Project Delivery Support Unit (PPDSU), the employee would act as the lead person responsible for managing specific aspects of the District 10 transportation programs. The employee will monitor financial resources and allocation requirements for state highway transportation projects generally categorized as bond projects, locally funded projects or State Transportation Improvement Program (STIP) projects. Knowledge of the California Transportation Commission and Caltrans guidelines for programming projects to the STIP and the State Highway Operation and Protection Program (SHOPP) is required. The employee will be required to manage the Program Change Request (PCR) process, assist with programming non-SHOPP projects, review Regional Transportation Plans (RTP) and monitor the Regional Transportation Improvement Program (RTIP). The employee will serve as the non-SHOPP liaison representing the PPDSU to all levels within the District Office, Central Region, and Headquarters (HQ), serve as a liaison regarding transportation planning functions with local agencies to ensure proper programming of projects, and advise our local partners on the process for resolving programming issues related to the Federal Transportation Improvement Program (FTIP). The employee will use custom software applications such as Project Resourcing and Schedule Management (PRSM) and California Transportation Improvement Program System (CTIPS) to manage funding programs, monitor funding sources, update project cost, and develop customized reports. Duties consist of, but are not limited to the following:

TYPICAL DUTIES: (BRIEF DESCRIPTION OF IMPORTANT DUTIES. RELATED DUTIES MAY BE GROUPED TOGETHER. USE ADDITIONAL SHEET IF NECESSARY.)

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

30% (E) Under the supervision and direction of the Branch Chief the employee is responsible for programming the District 10 non-SHOPP projects. Monitor all non-SHOPP programs. Manage project expenditures and provide program analysis of resource expenditures and allocations. Independently serve as Programming and Project Management (PPM) contact with HQ on programming issues for non-SHOPP projects. Coordinate with project managers to update non-SHOPP reports, coordinate with the local partners to ensure projects are federalized and programmed correctly in Federal/State Transportation Improvement Program, and advise local partners when programming requirements have changed. Manage the federal authorization process for project phases as described under the Statewide Preliminary Engineering System (SPES) mandates. Develop the non-SHOPP project candidate list and provide recommendations on programming strategy. Manage and report on the aspects of the Project Initiation Document (PID) program in coordination with the Office of Transportation Planning to track and monitor non-SHOPP PID phase expenditures.

30% (E) Serve as liaison between District Office of Transportation Planning and PPM in the review of highway improvement proposals as identified in the RTPs and comment on potential impacts to the state transportation network as it relates to planned and programmed projects and funding strategies. Responsible for reviewing and commenting on non-SHOPP draft project reports and subsequent coordination with our local partners, project managers and the District Office of Transportation Planning to ensure planning and programming related content has been addressed. Ensure progress of the document review process and associated actions are being delivered in compliance with existing Corridor System Management Plans and RTPs. Independently serve as PPM contact to our local partners and Caltrans staff to prioritize the District list for non-SHOPP candidate projects, ensure status of programming documents is complete and project information is accurate prior to submittal to HQ Planning. Respond to inquiries from local agencies. Communicate effectively, verbally and in writing with HQ Planning,

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District Office of Transportation Planning, Central Region PPM staff, project managers and Executive Office.

- 25% (E) Advanced support and capital programming of active projects. Prepare and evaluate management reports for monitoring program activities in the planning and Capital Outlay Support (COS) phases of projects. Analyze monthly and quarterly resource expenditures for appropriateness of charging. Work with project managers to assist in developing project PCRs and manage the PCR activities. Ensure consistency with federal and state regulations and requirements regarding project programming and the management of project support expenditures. Create reports for management and correspondence relating to programming issues, ensure timely actions are taken to complete amendments and provide corrections to programming data.
- 10% (E) Utilize CTIPS to monitor programmed resources. Develop and manage custom databases to assist with the management of transportation expenditures.
- 5% (E) Research issues, work independently to interpret internal and external program information, recognize critical issues, and then offer solutions. Prepare correspondence and comprehensive reports on status and issues of programs and projects.

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

The position is non-supervisory; however, the incumbent may be called upon to act in the absence of the supervisor for short periods of time.

KNOWLEDGE, ABILITIES AND ANALYTICAL REQUIREMENTS

The employee must have knowledge of Caltrans organization, transportation planning, department policies and procedures, an overall perspective of the project development process, the STIP Program, project management concepts, and the planning behind the development of our transportation systems. The incumbent must be able to apply and effectively communicate aforementioned knowledge verbally and in writing on a consistent basis.

The employee must have the ability to, based on planning experience and expertise, exercise good judgment on matters relating to PID development and prioritization; independently interpret project information and offer solutions to management; complete comprehensive reports; and be able to prioritize multiple tasks. Develop various processes associated with PPDSU, including issue memos, flow charts, District Directives and procedures manuals.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The employee is responsible for exercising a wide degree of initiative in carrying out assigned duties. Consideration of all input and pertinent factors is crucial to reaching conclusions and taking appropriate actions when coordinating the development of the STIP candidate list. Ability to work independently, negotiate issues with others and take initiative is essential. Errors, poor judgment or failure to recognize and communicate critical issues could result in missed deadlines, loss of programmable funds and subsequent non-delivery of projects. Incumbent is responsible for his/her actions, decisions, quality of completed work and proper use of state time, equipment and materials.

PUBLIC AND INTERNAL CONTACTS

The employee must maintain an effective, cooperative and professional working relationship with District management, District Planning, Headquarters, District and Central Region staff, Project Managers, local agencies and the public. The position may represent the Department regarding planning and programming issues at public and agency meetings for projects regarding specific subjects.

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PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employees may be required to sit for long periods of time using a keyboard and video display terminal. The incumbent must keep up with the fast paced demands of the STIP/Local management and PID oversight, extensive problem solving and rapid compiling of information for reports. Must have the ability to multi-task, adapt to changes in priorities and complete tasks or projects with short notice. Most of the jobs in the Division require interaction with many people; therefore it is important that the employees work with others in a cooperative manner. Employee shall value cultural diversity and other individual differences that may appear in the workforce. May be subject to and have the ability to handle irate or intense public or other project team members in a calm manner. Must be able to maintain emotional control during conflicts. Must be able to develop and maintain cooperative-working relationships with those contacted in the course of work, communicate effectively and respond appropriately to difficult situations; recognize emotionally charged issues or problems, and perform appropriately for a situation. Must be able to deal effectively with pressure, maintain focus and intensity yet remain positive and persistent, even under adversity. Must behave in a fair and ethical manner towards others and demonstrate a sense of responsibility and commitment to public service. Must be able to sustain mental activity to produce reports, problem solve, analyze and reason solutions and take the initiative to effectuate appropriate actions.

WORK ENVIRONMENT

While at their base of operation, employee will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. Incumbent may also be exposed to a variety of hazardous and/or unpleasant field conditions, including wet, rainy, foggy, cold or hot weather. Travel, including overnight travel, 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.)

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