

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Transportation Planner	12/Planning/Advance Planning-Project Studies	
WORKING TITLE	POSITION NUMBER	EFFECTIVE DATE
	912-840-4768-600	

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 supervision of the Branch Chief, a Senior Transportation Engineer, the Transportation Planner (TP) will assist in the quality control of Project Initiation Documents (PIDs) to ensure the integration of Planning and Engineering concepts. The incumbent will also assist in resource management, purpose and need development and scheduling for the Project Initiation Document (PID) program; assist in all activities relating to workload development, quarterly workload reporting and task management utilizing zero based budgeting. The incumbent will assist in the set-up of GIS database and GIS map production.

TYPICAL DUTIES:

Percentage		Job Description
Essential (E)/Marginal (M) ¹		
35%	E	Assist in reviewing Project Initiation Documents (PIDs) to ensure that PIDs meet Caltrans Missions, Visions, Values and Goals; the scope, cost and schedule meet the SHOPP programming requirements; and the writing quality of the documents.
30%	E	Coordinate with Project Management, District Budget Office, and Headquarters (HQ) Office of Program and Project Planning (OP&PP) to prepare Project Initiation Requests, which includes obtaining and processing project Expenditure Authorization (EA), Enterprise Resource Planning Financial InfraStructure (EFIS) project identification number, and Project Resource and Schedule Management (PRSM) setup. Assist in the coordination, preparation and processing of changes to Branch quarterly report for submission to OP&PP. Assist in maintaining and monitoring of projects expenditures utilizing updated informations gathered from labor report and PRSM. Regularly report to Senior Transportation Engineer and recommend improvements to effectively meet the Branch program budget, allocation, and schedule. Attend meetings related to the above duties as required.
30%	E	Assist in the set-up GIS database, development of GIS web applications, and production of GIS maps to support transportation planning and engineering studies. Assist in uploading completed Project Initiation Documents (PIDs) into local drive and State's Document Retrieval System. Assist in maintaining and updating the Branch's Intranet page.
5%	M	Other Advance Planning - Project Studies related duties as required.

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

Knowledge of District activities, policies, the entire Caltrans organization, sensitive issues, and lines of District delegation are required. Incumbent must be able to organize his/her own time, analyze constantly shifting workload and set priorities to meet strict deadlines. He/she must exercise a high degree of initiative and independent thinking, give and

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follow instructions with precision and competence, and will be expected to interpret and implement new policies or procedures with a minimum of instruction or explanation. Requires the ability to work effectively in different situations and adapt to a variety of conditions.

Essential skills include tact, discretion and mature judgment in contacts with District employees, including managers, headquarters staff, representatives of federal, State and local agencies, elected officials, and the public. General work qualities required for this position include the ability to consistently exercise good judgment, analyze situations accurately, good facilitation skills and the ability to run effective meetings, and take effective and timely action. Must work independently, recognizing when and how to follow through appropriately. Incumbent will require good organizational skills to work efficiently with frequent interruptions.

Also required, knowledge of business principles and modern methods of public and business administration to include: fiscal management, principles of modern office methods, forms, and equipment; public information channels and methods; organization and functions of the Department of Transportation; general knowledge of data analysis and processing using personal computers, including word processing and databases/spreadsheets; methods and techniques of effective team or conference leadership. Knowledge of the Departments' accounting systems such as Enterprise Resource Planning Financial InfraStructure (EFIS) and data management such as Program Resource & Scheduling Management (PRSM).

Analytical skills to identify and assess problems, draw logical conclusions, and adopt an effective course of action are required. Must reason logically and creatively. Will be relied upon to exercise good judgment; communicate efficiently and effectively, both orally and written; effectively manage time by establishing priorities; handle multiple tasks and meet deadlines; be able to carry out research, to gather, tabulate and analyze statistical data, and present it in an understandable and usable form.

GIS technology know-how.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent uses considerable judgment in providing factual information in response to numerous inquiries. Mistakes could cause poor public image for the District and/or department due to lack of proper response and delay in action. Consequence of error in any aspect of the incumbent's responsibilities would have a serious effect on the department's operations and credibility.

Poor judgment and analysis could affect work activities, adversely affecting the operation and function of the Division, or could cause delays to and create poor working relations with other departmental units and/or agencies.

PUBLIC AND INTERNAL CONTACTS

Frequent contacts within the district and headquarters. The employee must deal with situations in a courteous and professional manner.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent should be able to concentrate, analyze the situation at hand, and respond appropriately in a busy office environment. He/she may be required to handle several issues at the same time and should be able to prioritize tasks as necessary.

The incumbent must be able to develop and maintain cooperative work relationships and should have the ability to handle all work-related relationships with internal and/or external contacts in a professional and courteous manner.

WORK ENVIRONMENT

The work environment is typically a climate-controlled office. The incumbent may sit for long periods of time while using a keyboard and video display terminal. There are ADA-compliant restrooms on the same floor as the office and a

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cafeteria within the office complex. There are elevators that can transport the incumbent to all floors of the office complex. The workspace is equipped with a phone, computer, and access to a printer, copier, and scanner.

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