

DUTY STATEMENT

ASSIGNMENT TITLE Transportation Planner	DIVISION/OFFICE/BRANCH Division of Transportation Planning Office of Project Scoping Coordination Project Initiation Document Management Branch	
NAME: <u>XXXX XXXX</u>	DISTRICT HQ-74	EFFECTIVE DATE <u>XX XX XX</u>

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

General Statement

The incumbent is an entry-level position within the Project Initiation Document (PID) Management Branch in the Office of Project Scoping Coordination (OPSC). Under the direction of the PID Management Branch Chief, the incumbent works on PID planning staff assignments of average difficulty. The incumbent assists with reporting on the progress and performance of the PID program to outside agencies. The incumbent also provides guidance to the Districts relating to the reporting requirements and maintains internal processes in support of the reporting requirements. Some assignments may be given by the Office Chief, and includes assisting with other Transportation Planning Program efforts. Proficiency in spreadsheet applications is required.

Typical Tasks

- 30% E The incumbent prepares periodic reports detailing PID development progress, expenditure, and performance. Reports may be generated annually, quarterly, or other intervals. The reports are presented to the Legislative Analyst’s Office, Department of Finance, and other external departments. Incumbent coordinates with Headquarters and District PID offices to periodically review and revise PID data to ensure accuracy and validity. Develop and maintain standardized repository for PID archives.
- 25% E Coordinates with other liaisons to gather and analyze PID data for periodic reporting purposes. Work with liaisons and districts to identify PID project priorities, verify resource needs, and distribute projects within present and future funding and budget cycles. The incumbent monitors and reports PID development progress, analyzes statistical program trends, and solicits feedback from District and Headquarters. The incumbent assists liaisons in facilitating development, approval, and reporting of PIDs by coordinating between Headquarters OPSC and District Offices.
- 25% E Under the direction of the Branch Chief, the incumbent develops guidance providing instruction relating to the PID process involving other Caltrans functions including cooperative agreements,

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local assistance, Department of Finance, Division of Design, and Division of Maintenance, and Division of Engineering Services. Refine, develop, and update products required for PID processing such as approval forms, accounting system submittals, milestone checklists, and PID type approval. Under guidance of a lead worker or a Branch Chief, coordinate with related functional units to ensure guidance consistency with Budget Change Proposal (BCP) process, the PID statewide strategic plan, the Project Development Procedure Manual, the Workplan Standards Guide, and the Work Breakdown Structure.

- 15% E The incumbent assists the PID Workload and Development Branch with documenting and justifying workload and resources needs relating to Budget Change Proposals, Finance Letters, and other Department related budget documents. Incumbent extracts, verifies, and analyzes current and historic PID data.
- 5% M The incumbent prepares PID Program correspondence, issue memos, fact sheets, data analysis and other written material as required.

Supervision Exercised

No supervision is exercised.

Supervision Received

Supervision is received from the Branch Chief, but may be received from the Office Chief as well. Additional assignments may be generated by requests from the Department's management, Districts, or other HQ units.

Knowledge and Abilities

This position requires the incumbent to understand and be able to articulate both, verbally and in writing, research and analysis methods, and their conclusions. The incumbent must be able to understand and communicate 1) principles, process, practices and legal requirements of transportation planning, 2) current departmental policies and programs, 3) Federal and State laws and regulations relating to transportation planning, 4) Regional Planning, System Planning and Advanced Planning, and project development processes and procedures, 5) principles of traffic operations and programming, 6) legislative processes, 7) roles of the Federal, State and Regional governments in providing transportation planning services, and 8) land use law and practice.

The incumbent must have the ability to analyze and interpret data and to apply analytical techniques to recommend creative solutions to address transportation problems using spreadsheet, word processing, and relational database applications. The incumbent must also communicate effectively both verbally and in writing. The incumbent must possess the ability to effectively make presentations using a variety of media including but not limited to computer presentation software, paper flip charts, white boards, and strip maps. The incumbent must effective work individually or as an interdisciplinary team member.

RESPONSIBILITY FOR DECISIONS, ACTIONS AND CONSEQUENCES

Recommendations and decisions made by this position may directly impact the Departments' overall Planning program as well as those of our regional and local agency and government partners. Failure to

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consider the political sensitivity or to fully evaluate the fiscal, economic, social and environmental effects of decisions on the Department's programs could result in the inefficient use or loss of funding, delay of project delivery, and ineffective transportation planning.

WORK ENVIRONMENT

Working hours will be set between 6:00 a.m. and 6:00 p.m. The incumbent may be required to travel to work related events throughout the State as necessary.

PHYSICAL, MENTAL AND EMOTIONAL REQUIREMENTS

Employees may be required to sit for long periods of time using a keyboard and monitor. Must be able to develop and maintain cooperative working relationships by demonstrating tactfulness and treating others with respect, make decisions in a fair and ethical manner, and demonstrate a sense of responsibility and commitment to public service. Must be open to change and new information, adopting new work methods in response to changing conditions or unexpected obstacles, and have the ability to multi-task and complete tasks within deadlines and with short notice.

I have read and understand the duties listed above and can perform them with/without reasonable accommodation. *(If you believe you may require reasonable accommodations, inform the hiring supervisor. If you are unsure whether you require reasonable accommodations, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)*

EMPLOYEE

DATE

I have discussed the duties with and provided a copy of this duty statement to the employee named above.

SUPERVISOR

DATE