



**STATE OF OREGON  
POSITION DESCRIPTION**

**Position Revised Date:**  
January 25, 2019  
*(only change if revisions are made)*

**Service Type  
of this position is:**  
(Check one box only)

Classified (C):  
 Represented (fill in 1.j below)  
 Unrepresented

**Agency:** Dept of Transportation

**Division:** Highway-Region 1

This position description is for:

- A new position that is being established
- An existing position that is being revised
- No change – Annual review

**SECTION 1. POSITION INFORMATION**

<b>a.</b> Classification Title:	<u>Planner 4</u>	<b>b.</b> Classification No:	<u>C1099</u>
<b>c.</b> Effective (Est.) Date:	<u>July 1, 1995</u>	<b>d.</b> Position No:	<u>1121001</u>
<b>e.</b> Working Title:	<u>Principal Transportation Planner</u>	<b>f.</b> Agency No:	<u>73000</u>
<b>g.</b> Section Title:	<u>Region 1 Major Projects</u>	<b>h.</b> Budget Auth No:	<u>000713950</u>
<b>i.</b> Employee Name:	<u>VACANT</u>	<b>j.</b> Union Repr Code:	<input type="checkbox"/> SEIU(OA)
<b>k.</b> Work Location (City – County):	<u>Portland - Multnomah</u>		<input checked="" type="checkbox"/> AEE (E)
<b>l.</b> Supervisor Name:	<u>Mandy Putney</u>		

<b>m. Position:</b> check the one/s that apply	<input checked="" type="checkbox"/> Permanent	<input type="checkbox"/> Seasonal	<input type="checkbox"/> Limited Duration	<input type="checkbox"/> Double Fill
<b>n. Position:</b> check only the one that applies	<input checked="" type="checkbox"/> Full-Time	<input type="checkbox"/> Part-Time	<input type="checkbox"/> Intermittent	<input type="checkbox"/> Job Share
	<input type="checkbox"/> Academic Year			
<b>o. FLSA:</b>	<input checked="" type="checkbox"/> Exempt	<b>If Exempt:</b>	<input type="checkbox"/> Executive	<b>p. Eligible for Overtime:</b>
	<input type="checkbox"/> Non-Exempt		<input checked="" type="checkbox"/> Professional	<input checked="" type="checkbox"/> Yes
			<input type="checkbox"/> Administrative	<input type="checkbox"/> No

**SECTION 2. PROGRAM AND POSITION INFORMATION**

**a. Describe the program in which this position exists. Include program purpose, who is affected, size, and scope. Include relationship to agency mission.**

The Oregon Department of Transportation exercises leadership and vision in promoting, developing and managing a statewide network of transportation systems and facilities. These systems and facilities provide access to Oregon for the State's citizens and visitors, provides efficient movement of commerce, goods and services, ensures the safety of transportation systems users, and enhances Oregon's competitive position in national and international markets. ODOT is a geographically-spread organization of approximately 4500 FTE with a \$3.8 billion biennial budget.

ODOT Highway Division is responsible for construction, improvement, maintenance, and operation of the state highway systems to serve the public of the State of Oregon.

Region 1 operates and maintains state highways and implements the Department's programs and projects in four counties: Clackamas, Hood River, Multnomah and Washington. Senior managers lead the four regional business lines: Business Operations, Maintenance and Operations, Policy & Development, and Project Delivery.

The Policy and Development Section is responsible for managing and implementing planning policy, project development, and coordination with federal, regional, and local agencies and jurisdictions. The section supports ODOT's mission by providing: policy analysis and recommendations; long-range planning for land use and for transportation facilities; refinement planning that results in specific projects ready for project development; and review of proposed development that affects state transportation facilities. This unit works extensively with Metro and local governments to develop and agree on land use and transportation solutions and cost allocations. Many issues are multi-disciplinary in nature and politically sensitive. The section includes approximately 25 FTE with a biennial budget of \$11 million, not including special projects funded by federal or other jurisdictions.

Major Projects Unit project teams focus on taking the project from the initial concept through Preliminary Engineering (PE) and National Environmental Policy Act (NEPA) approval. This may include system planning, alternatives development including transportation and environmental analysis for active transportation, transit, freight, highway and multi-modal projects. The work includes active involvement of a wide range of stakeholders representing diverse perspectives. Senior Major Projects Planners or Project Leaders lead these teams. After the PE/NEPA phase is completed, Senior Major Projects Planners transition their work to Area Managers to complete final plans for construction.

**b. Describe the primary purpose of this position, and how it functions within this program.**

**Complete this statement. The primary purpose of this position is to:**

Independently lead major, controversial, and complex planning projects of statewide significance through planning, NEPA, and/or preliminary design for project-ready hand-over and implementation by Area Managers. This requires resolution of significant policy and regulatory issues that have far-reaching effects on development of the Portland metropolitan region and the livability and economic well-being of the state.

Provide policy and project management guidance in moving major, often controversial, planning projects from conceptual plan to regional consensus, addressing all regulatory and community issues through Preliminary Design, for project-ready hand-over for implementation phase. Serve as regional ODOT liaison to other state, regional, and local agencies on policy and project basis. Coordinate project-related government affairs, including briefings and elected officials and interagency leadership. Assist in defining and developing future projects for region 1, based on policy and Region 1 needs.

This position is a member of the Region's Policy and Development Team and provides planning guidance to ODOT Region 1 Manager, and agency management, on policy and project matters.

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### **SECTION 3. DESCRIPTION OF DUTIES**

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List the major duties of the position. State the percentage of time for each duty. Mark “N” for new duties, “R” for revised duties or “NC” for no change in duties. Indicate whether the duty is an “Essential” (E) or “Non-Essential” (NE) function – for ADA purposes.

**The following are general requirements for performance of the duties listed below: maintains regular and punctual attendance; contributes to a positive and productive work environment; establishes and maintains professional and collaborative working relationships with all contacts.**

Be a respectful member of a team, which includes communicating and working effectively and appropriately with a variety of individuals or groups with diverse cultural beliefs, values and behaviors.

% of Time	N/R/NC	E/NE	DUTIES
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**Note:** If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit “Enter”.

15%	R	E	<p><b><u>Policy Guidance:</u></b></p> <ul style="list-style-type: none"> <li>• <b>Planning Policy Development:</b> Interpret and integrate policy issues associated with developing Projects of Statewide Significance with other ODOT, regional, and local planning efforts. Keep Region Manager apprised of state and regional policies. Work with Region Planning and Development Leadership Team on special projects including policy guidance and interpretation. Work with local and regional jurisdictions on implementing long-range facility plans, and draft proposals for approval by elected officials of local jurisdictions.</li> <li>• <b>Contact and coordination:</b> Report and recommend direction on planning policy issues to Region Manager, and agency upper management regarding project development, as needed, to keep apprised of policy and political issues. Develop and maintain regular contact with local and regional agencies, stakeholders, business owners, FHWA, ODOT Salem, to clarify policies and procedures.</li> </ul>
75%	R	E	<p><b><u>Project Management and Planning Consultation:</u></b></p> <ul style="list-style-type: none"> <li>• Manage statewide significant and major regional projects to design, prepare, and amend public facility plans. Oversee professional agency and consultant staff in developing and implementing planning efforts. Integrate regional planning efforts and agency policy directions.</li> <li>• Work with State, regional, and local governments in Region 1 to define and develop major transportation improvement Projects of Statewide Significance based on policy and Region 1 needs. This will include working within the framework of the National Environmental Policy Act (NEPA) as well as state, regional and local plans, including the Metro 2040 land use concept and the Regional Transportation Plan (RTP), state Transportation Planning Rule, Interchange Area Management Plans (IAMP).</li> <li>• Manage all activities, including delegation of tasks, necessary to ensure implementation of House Bill 2017 for assigned projects.</li> <li>• Be responsible for all activities necessary to ensure assigned projects are moved through the Project Development process. Initiate and manage planning for major transportation improvement projects in region along principal ODOT highway corridors. Principal Planners are responsible for the work scopes and budgets for planning studies, agency reconnaissance studies, Environmental Assessments (EA), and Environmental Impact</li> </ul>

			<p>Statements (EIS), to evaluate transportation solutions for the regional transportation system. These projects are often high visibility and require interaction/policy discussions with the public and senior and executive staff from other federal, state and local agencies and the Oregon Transportation Commission</p> <ul style="list-style-type: none"> <li>• Prepares and manages a work plan for all assigned projects, coordinating tasks, schedules and budgets, including contractor work orders and agency staff oversight.</li> <li>• Works directly with ODOT Project Delivery unit and Area Managers to transition projects to final design phase and implementation.</li> <li>• Negotiates changes in scope of work, schedule, budget for planning projects with contractors, stakeholders, agency staff, as well as updates and documents ongoing project activities</li> <li>• Defines and manages project scope, schedule and budget. This position has responsibility for managing Agency approved planning project work scope, budgets and schedules for ODOT and other agency staff and contractors of \$2-4 million or more on larger projects</li> <li>• Lead multi-disciplinary project teams. Identifies project disciplines needed to accomplish project objectives. Determines whether those resources are available in-Agency (budget/ availability of staff), or whether private sector consultants will be required. Principal Planner will have primary involvement in work planning and assignments, work monitoring and providing direction to project team and junior staff.</li> <li>• Provides Project Team members (including consultants) with feedback and coaching on performance. Provide input to managers for performance plans, performance reviews and appraisals. Review and comment on technical material provided by consultants.</li> <li>• Active with public involvement and represent agency on project advisory/steering committees, comprised of local/regional staff, stakeholders, citizens and sometimes with the media. Lead those committees in developing purpose and need statements, goals and objectives, policy direction and proposed actions. Present recommendations for projects to build consensus for adoption and possible implementation. Advise local governments on state policy requirements</li> <li>• Responsible for interagency coordination on assigned projects, including building consensus and managing necessary approvals to move projects through the Project Development process.</li> <li>• Coordinate government relations for assigned projects, in coordination with Region 1 Government Affairs department. Responsibilities include briefings with elected officials and interagency leadership.</li> <li>• Manage all activities necessary for preparing grant applications for Projects of Statewide Significance.</li> </ul>
10%	NC	E	<p><b><u>Contract Management:</u></b></p> <p>Develop Personal Services Contracts and Intergovernmental Agreements (IGA) among regional/local jurisdictions, including work scope, responsibilities, and budget.</p> <ul style="list-style-type: none"> <li>• Administer agreement and contracting procedures, including soliciting proposals, reviewing proposals and selecting</li> </ul>

			<p>contractors, and coordinating and managing transportation planning contracts.</p> <ul style="list-style-type: none"> <li>• Drafts or provides input for intergovernmental agreements (IGA), when needed, and negotiates with other governments the details of the agreements. Provides draft to IGA specialist for processing.</li> </ul>
0%	N	E	<ul style="list-style-type: none"> <li>• Moderate amounts of travel may be required, including limited out-of-state travel.</li> </ul>

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100%

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## SECTION 4. WORKING CONDITIONS

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**Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.**

This position works a professional workweek, it involves complex agency programs, which require careful attention to technical deadlines and also involves issues that have a direct impact on citizens and others whose interests are affected by agency programs and actions. The job may involve direct and telephone contacts with the media, and public in conditions which may be stressful, emotionally charged or hostile.

A moderate amount of overtime will be required in this position. This will include meetings at night and occasionally on weekends. There may also be times of increased workload to meet critical deadlines, since position has competing demands, tight time schedules, and simultaneous projects with overlapping deadlines, requiring extra work at night and weekends to meet that need.

Primarily, this position is in an office environment. There is extensive and varied use of personal computer (e-mail, word processing, spreadsheets, databases, presentations, geographic information systems, project scheduling, etc.). There is occasional work outdoors at project sites, as needed.

There is frequent phone and in-person contact and meetings with other ODOT regions and staff, other agencies, FHWA, local government leaders and staff, and the general public.

A valid driver license, an acceptable driving record and the ability to drive is required for this position.

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## SECTION 5. GUIDELINES

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**a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.**

Applicable Federal and State constitution provisions and laws, and related federal codes and rules. Other Federal agency rules pertaining to NEPA, Endangered Species, and others; State and federal laws and regulations pertaining to transportation modes and systems. Oregon Administrative Rules, policies, and manuals as set forth by the agency, including the LCDC Statewide Land Use Planning Goals and Transportation Planning Rule; Public Involvement Guidelines; AEE collective bargaining agreements; ODOT Strategic Plan; Oregon Transportation Plan; Oregon Highway Plan and other modal and safety plans; Oregon Action Plan, Oregon Benchmarks; Project Leader Guidebook, Project Team Policy Paper, Project Leader Guide; Scope, Schedule, and Budget Manual; AASHTO Manuals; ODOT Highway Design Manual; ODOT Affirmative Action Plan; Personnel rules and policies; Office procedures and practices; Purchasing manual; and miscellaneous special publications. Attorney General's Administrative Law Manual and Rules of Procedure, Federal surface transportation act and related FHWA rules, ODOT State Agency Coordination Program, Corridor Plans and area transportation system plans, Local and Regional comprehensive plans

**b. How are these guidelines used?**

This position requires familiarity with Oregon and federal transportation, environmental and land use laws and rules. It also requires a clear understanding of the policies, and planning direction, that play an important role achieving planned transportation objectives. The position requires the exercise of considerable judgement and broad discretion in determining how to apply rules and policies.

Applicable requirements of the Oregon Administrative Procedures Act, the Attorney General’s Rules of Procedure and Administrative Law manual are pertinent when the position is involved in procuring consulting services, advising on issuing grants or assisting in development of rules.

These guidelines/reference materials are used frequently. The Principal Planner must determine/interpret which of these constraints are applicable in arriving at appropriate solutions and implementation actions. With the wide range of duties and responsibilities required by the Principal Planner position, these guidelines and manuals provide a critical reference to ensure the work is done in accordance with relevant laws and regulations, design standards and specifications, sound engineering principles, and that staff are led using acceptable personnel practices.

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**SECTION 6. WORK CONTACTS**

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**With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?**

Who Contacted	How	Purpose	How Often?
Technical staff / management	In-person/phone/ writing/ email	Discuss progress; Assign/monitor work; Resolve issues	Daily
Region Management	In-person/phone/ writing/ email	Discuss progress; Alert to and/or recommend resolution of policy and project issues	Daily
Local staff/officials	In-person/phone/ writing/ email	Explain project activities, resolve issues	Daily
Consultants	In-person/phone/ writing/ email	Coordinate projects & admin. Contracts	Daily
Citizens Stakeholders	In-person/phone/ writing/ email	Discuss activities, Resolve complaints; Negotiate design details	Daily
ODOT administration	In-person/phone/ writing/ email	Information/recommendations on policy and project issues	Weekly
Other state agencies	In-person/phone/ writing/ email	Discuss regulations, policies	Weekly
Federal Hwy. Administration	In-person/phone/ writing/ email	Discuss regulations, policies	Weekly
OTC	Meetings/Hearings/ email	Information, recommendations on projects	Occasionally
Asst. Attorney General	Phone/email	Information/advise	Occasionally
News media	In-person/phone	Explain project activities/alternatives	Occasionally
Legislators	Meetings/Hearings/ email	Information	Occasionally

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## SECTION 7. POSITION RELATED DECISION MAKING

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**a) Describe the typical decisions of this position.**

The Principal Planner will be making decisions and recommendations on complex planning policy and project issues. The Principal Planner will provide Agency position on policies in the Oregon Transportation Plan, Oregon Highway Plan, Oregon Transportation Planning Rule, NEPA, and other transportation/ land use/environmental policies and regulations as they apply to development of statewide significant highway corridor projects and potentially, development of toll roads or bridges in Oregon.

Factors to be considered will be diverse in nature, relating to established policies on land use, transportation, local community structure, political situation, program and funding requirements

**b) Explain the direct effect of these decisions.**

The above decisions, and recommendations for Agency policy amendments will have a direct effect on the level of effectiveness of plans and programs in achieving the agency's mission and objectives with regard to constructing the highway projects, and on agency success in securing adoption of its proposals in regional and local government transportation systems plans.

Within the framework of the established scope, schedule and budget, decision authority for project management resides with the Principal Planner.

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## SECTION 8. REVIEW OF WORK

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**Who reviews the work of the position?**

Classification Title	Position No.	How	How Often	Purpose of Review
Major Projects Manager PEM/E in consultation with Region Policy and Development Manager PEM/F	1131043 and 1601023	Individual meetings, team meetings, and review of staff reports	On a regular basis, generally weekly and at key junctures in the course of major work assignments	To monitor overall progress on assigned duties, coordinate work, evaluate the quantity and quality of work performed and review the status of projects. The review is also to respond to unexpected or highly sensitive matters and to provide direction where agency policy position is not clear.

*Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".*

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## SECTION 9. OVERSIGHT FUNCTIONS FOR MANAGEMENT SERVICE SUPERVISORY (MMS) POSITIONS ONLY

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**NOT APPLICABLE FOR THIS SERVICE TYPE**

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## SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

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**ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:**

**General:** This position will be very important to effectively developing major statewide and interstate significant transportation projects. This will require much work within ODOT and close coordination with federal agencies, DLCDC, local government staff and elected officials and the general public.

**Special Requirements:** List any mandatory recruiting requirements for this position:

- Principal Planner must have a broad understanding of ODOT policies and standards, and be able to clearly articulate these policies to local agencies, stakeholders, and public. Must be able to explain new program initiatives, such as the agency’s innovative public/private partnership program evaluating the feasibility of highway tolling measures to fund Projects of Statewide Significance.
- Principal Planner must have technical expertise sufficient to recognize technical issues that may impact their projects. Must include Environmental / NEPA Project Management, including ODOT/FHWA Responsibilities, NEPA Process and Documentation / Review, Engineering Design Management, Preliminary Design / Review and Transportation Analysis including Traffic Forecasting / Operations Analysis / Review.
- Principal Planner must have expertise in managing projects, preferably with both consultants and with ODOT teams. He/she must have skills in scheduling, budgeting, and team management. Principal Planners must be able to successfully negotiate work items and schedules with all parties involved in developing the project. They must be able to lead, stage, and complete multiple complex projects simultaneously.
- Principal Planners must have experience and confidence in conducting and managing public involvement and outreach, including demonstrated experience in public speaking, media relations, etc. They must represent ODOT well in external and internal agency meetings, public meetings, one on one contacts with citizens and business representatives, elected officials, and with the media (newspapers, radio, television...).
- Principal Planners must have experience in Consultant Management. Most of ODOT’s project development work will be done through consultant contracts. Experience developing and managing project scope, schedule and budget.
- Principal Planners must have experience in Contracting and Intergovernmental Agreements. This employee must be well-versed in agreement and contracting procedures, including soliciting proposals, reviewing proposals and selecting contractors, and coordinating and managing contracts.

**BUDGET AUTHORITY:** If this position has authority to commit agency operating money, indicate the following:

Operating Area ( <i>Personal Services; Services &amp; Supplies; Capital Outlay</i> )	Biennial Amount (\$00000.00)	Fund Type ( <i>General; Other; Federal; Lottery</i> )
N/A	N/A	N/A



**DESIGNATION OF CRIMINAL BACKGROUND CHECK (CBC) REQUIREMENT:**

Review the criteria below. Indicate if the position is assigned these duties or responsibilities. If one or more boxes is checked yes, a CBC is required prior to filling the position.

The employee in this position...

- 1. Provides information technology (IT) services and has control over access to Department information technology systems that could allow the individual to harm these systems or the information contained within the systems. This relates to having responsibilities that involve development, programming, installation, maintenance or other technical aspects related to Department hardware and software. It is not intended to include positions with responsibilities that only utilize IT systems, such as entering and retrieving data.....  Yes  No
- 2. Has responsibility for receiving, receipting, or depositing money or negotiable instruments. ....  Yes  No
- 3. Has responsibility for payroll functions. ....  Yes  No
- 4. Has responsibility for purchasing or selling property, or has access to private property in the Department's custody (such as Right of Way and Facilities). It is not intended to include positions with responsibilities that may involve simply being on private property to perform certain duties. ....  Yes  No
- 5. Has access to personal identification information about employees or members of the public, including Social Security numbers, date of birth, driver license numbers, medical information, personal financial information or criminal background information.....  Yes  No

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**SECTION 11. ORGANIZATIONAL CHART**

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Attach a current organizational chart.

***Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, and employee name and position number.***

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**SECTION 12. SIGNATURES**

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Employee Signature                      Date

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Supervisor Signature                      Date

\_\_\_\_\_  
Appointing Authority Signature                      Date

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Printed Name of Appointing Authority