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A. GENERAL INFORMATION

1. Date

06/11/2026

2. Department

Caltrans

3. Organizational Placement (Division/Branch/Office Name)

Data & Digital Services

4. CEA Position Title

Head of Product

5. Summary of proposed position description and how it relates to the program's mission or purpose.
(2-3 sentences)

Position provides executive leadership for product policy and life-cycle governance across Rail and Transit Programs, operating through the Division of Data & Digital Services. The position ensures that digital services, grant systems, and shared modal technologies (hardware and software deployed by local/regional agencies) are prioritized, delivered and continuously improved to achieve measurable customer and policy outcomes. By institutionalizing product management and customer success, the role enables the Department to advance integrated, customer-centered mobility in alignment with statewide climate, equity and multi-modal policy objectives.

6. Reports to: (Class Title/Level)

Division Chief, Data & Digital Services

7. Relationship with Department Director (*Select one*)

- ☐ Member of department's Executive Management Team, and has frequent contact with director on a wide range of department-wide issues.
- ☒ Not a member of department's Executive Management Team but has frequent contact with the Executive Management Team on policy issues.

(*Explain*): The role will be an adviser to Executive Management at Caltrans related to matters within the Division of Data and Digital Services.

8. Organizational Level (*Select one*)

- ☐ 1st ☐ 2nd ☐ 3rd ☐ 4th ☒ 5th (mega departments only - 17,001+ allocated positions)

B. SUMMARY OF REQUEST

9. What are the duties and responsibilities of the CEA position? Be specific and provide examples.

Under the guidance of the Chief of the Data and Digital Services Division (DDS), the Head of Product establishes and leads Caltrans' enterprise Product, Product Marketing and Customer Success functions. This position is responsible for developing and implementing Product policy, governing the full product life-cycle, from discovery and prioritization through delivery, adoption, and continuous improvement, for customer-facing digital products and modal technologies, grant systems, data-enabled services that support Caltrans' role as a statewide transportation network manager and any other product assigned to DDS.

Duties of the incumbent include:

Define, implement, and govern statewide Product policy for Data and Digital Services, including product lifecycle management, prioritization, standards adoption, outcome measurement, and sunseting. Hire, train, and lead Product Management and Customer Success teams. Establish and maintain a Product Center of Excellence, including a Caltrans Product Playbook, Product Academy, and formal Product Governance framework that sets decision rights, escalation paths, and accountability for customer-facing digital platforms, grant systems, and data-enabled services, including their decommissioning.

In partnership with Data, Service Design, and Mobility Standards Engineering leadership, establish and govern the DDS intake and prioritization policy for all work proposed to or assigned to Data and Digital Services. Maintain and approve the authoritative DDS product roadmap and backlog, resolving cross-program priority conflicts and ensuring alignment with Caltrans mission, adopted policy, legislative direction, and funding constraints. Define and oversee the use of Objectives and Key Results (OKRs) to evaluate product performance and inform ongoing investment decisions across DDS.

Define and govern Customer Relationship Management (CRM) policy, use cases, and operating model to organize Caltrans around its customers. In partnership with Information Technology, establish the functional requirements, workflows, and data standards for a Planning & Modal Programs wide CRM platform that supports Product and Customer Success objectives. Provide day-to-day supervision of the Customer Success and CRM functional teams, while collaborating with IT on system configuration, security, and operations. In close coordination with Service Design, prioritize CRM user stories to ensure the system supports consistent, equitable, and effective customer interactions across all Planning & Modal Programs.

The position directly affects how billions of dollars in transportation investments are translated into usable, equitable, and effective products statewide.

B. SUMMARY OF REQUEST (continued)

10. How critical is the program's mission or purpose to the department's mission as a whole? Include a description of the degree to which the program is critical to the department's mission.

- ☒ Program is directly related to department's primary mission and is critical to achieving the department's goals.
- ☐ Program is indirectly related to department's primary mission.
- ☐ Program plays a supporting role in achieving department's mission (i.e., budget, personnel, other admin functions).

Description: The Product CEA and associated Program is directly and critically linked to Caltrans' mission because it determines how adopted policy is translated into usable, effective, and scalable outcomes. Things such as CAPTI, CSIS, SB 960, SB 125, the Governor's climate and transportation Executive Orders, and the Transit Transformation Task Force all require Caltrans to elevate transit, rail, and sustainable modes—but those mandates are increasingly executed through products: grant systems, digital platforms, and shared modal technologies.

Without enterprise Product governance, Caltrans risks fragmented investments, low adoption, and policy failure despite strong, and increasing, statutory direction. Product is therefore not a support function; it is a primary mechanism by which Caltrans delivers its mission in practice.

B. SUMMARY OF REQUEST (continued)

11. Describe what has changed that makes this request necessary. Explain how the change justifies the current request. Be specific and provide examples.

What has changed is the way Caltrans delivers policy and services. Caltrans' planning & modal programs increasingly execute adopted transportation policy through digital products, grant programs/systems, data platforms, and shared modal technologies, rather than through stand-alone programs or one-time funding actions. This shift was explicitly recognized in the 2024–25 California Integrated Mobility Budget Change Proposal, approved by the Legislature, which authorized expanded staffing and investment to modernize digital services, improve technical assistance, streamline business processes, and support statewide multi-modal coordination.

At the same time, statewide mandates—including CAPTI, the resultant Caltrans System Investment Strategy (CSIS), SB 960, SB 125, and the CalSTA Transit Transformation Task Force recommendations—require Caltrans to deliver more coordinated, customer-centered, and outcome-driven transit and rail investments and outcomes. These directives cannot be met through ad hoc project management or consultant-led efforts alone. They require enterprise product governance to determine what products and technologies are built or procured, how they are prioritized, and whether they achieve measurable outcomes that are consistent with adopted policy.

The Head of Product (CEA) is necessary to institutionalize this capability within Caltrans. The position provides the policy authority and life-cycle accountability required to translate the Legislature's investment in Integrated Mobility and digital modernization into durable, statewide outcomes—ensuring that Caltrans' expanding portfolio of digital services and modal technologies advances climate, equity, and integrated mobility goals in practice, not just in statute.

C. ROLE IN POLICY INFLUENCE

12. Provide 3-5 specific examples of policy areas over which the CEA position will be the principle policy maker. Each example should cite a policy that would have an identifiable impact. Include a description of the statewide impact of the assigned program.

1. Product Prioritization and Life-Cycle Policy

Policy: Establish statewide policy governing which digital and modal technology products Caltrans builds or procures, for whom (small, rural, urban agencies, Districts, HQ), in what sequence, and under what conditions products advance, scale, or sunset.

Statewide impact: Replaces ad hoc, bespoke solutions with intentional investment decisions that maximize adoption and equity. Prevents over-customization and resultant vendor lock-in, reduces stranded pilot projects, and ensures limited state resources deliver usable, statewide value.

2. Usability and Consistent Product Experience Policy

Policy: Require all customer-facing Caltrans tools (grants, data systems, modal technologies) to meet baseline usability, clarity, and interoperability standards, even when built by different programs or vendors.

Statewide impact: Reduces administrative burden, conflicting instructions, and duplicative data requests across discrete databases and systems that currently consume local agency capacity. Improves trust, adoption, and effectiveness of Caltrans tools across the regions and Caltrans Districts.

3. Integrated Transit and Modal Technology Policy

Policy: Establish product policy for shared transit and mobility technologies (e.g., payments, traveler information, data exchange) and ensure their presence in any fully implemented statewide transit plan, ensuring compatibility and future integration.

Statewide impact: Enables Caltrans to act as a steward of interoperable systems rather than a funder of disconnected tools and unplanned projects. Lays groundwork for future statewide transit integration consistent with CAPTI, SB 960, SB 125, and the Transit Transformation Task Force recommendations.

4. Data and Administrative Burden Reduction Policy

Policy: Set policy to eliminate duplicative data collection, inconsistent reporting requirements where not required by legislation, and conflicting guidance across Caltrans products and programs by reusing data once collected. Statewide impact: Frees significant Caltrans staff as well as local agency staff time currently diverted from service delivery, improves data quality, strengthens Caltrans' ability to assess outcomes across programs.

C. ROLE IN POLICY INFLUENCE (continued)

13. What is the CEA position's scope and nature of decision-making authority?

The Head of Product (CEA) exercises statewide, cross-program decision-making authority over product policy, prioritization, and life-cycle governance within the Division of Rail & Transit, operating through the Data and Digital Services (DDS) Division, including the California Integrated Mobility (CIM) Program.

The position has delegated authority to establish and enforce product policy governing how customer-facing digital services, grant systems, and modal technologies are proposed, prioritized, delivered, adopted, scaled, or sunset. This includes maintaining the authoritative DDS product road-map and backlog, resolving cross-program priority conflicts, and aligning investment decisions with adopted policy, legislative direction, funding constraints, and customer readiness.

The CEA's authority is enterprise in nature, not program-specific. Decisions made by this position directly affect multiple divisions, funding programs, and external partners statewide. The Head of Product collaborates with Service Design, Data, Mobility Standards Engineering, and Information Technology, but retains final decision-making authority over what products proceed and to what standard of success, while IT retains authority over system implementation, security and maintenance.

The Head of Product holds binding decision-making authority over the products through which Caltrans delivers policy, making this role central to achieving statewide mobility, climate, and equity outcomes.

14. Will the CEA position be developing and implementing new policy, or interpreting and implementing existing policy? How?

This role would both develop and implement new internal policy and interpret and operationalize existing statutory and administrative policy within the Division of Rail & Transit. The position will also interpret and implement existing policies—including ones related to CAPTI, SB 960, CSIS, and Complete Streets—by translating mandates into implementable service blueprints, digital systems, and standardized processes used across Rail and Transit Programs.