(PD-04) Local Assistance
Resident Engineer (RE) Academy

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Chapter 5 - Control of Material

Chapter 6 - Labor Compliance

Chapter 7 - Claims & Claim Avoidance

Chapter 8 - Contract Change Order

Chapter 9 - Project Completion & Invoicing

Chapter 10 - Local Agency/Resident Engineer Liability
Course Description and Learning Objectives

This course provides resident engineers with all of the essential information and principles they need to be successful. All aspects of a resident engineer's roles and responsibilities are covered. This course offers valuable training whether you're newly appointed, soon-to-be, or a seasoned resident engineer desiring refresher training. As a Resident Engineer, your position requires you to have a good understanding of project management, contract administration, financial and funding rules, risk management, and federal and state labor rules, in addition to your technical expertise. Frequent changes to state and federal requirements make it necessary for you to keep your knowledge and skills constantly updated. The Technology Transfer Program in conjunction with the Caltrans Division of Local Assistance provides the Resident Engineer’s Academy to enable you to sharpen your work skills and become an effective and successful Resident Engineer. The Resident Engineer Academy provides a unique learning environment designed to promote networking.

This is a practical, interactive course with presentations from various subject matter experts and trainers providing core training for resident engineers. The presenters use a real-life approach to deliver information utilizing examples, problem-solving activities, and exercises.

Topics Include

- Resident Engineer roles and responsibilities
- Pre-construction preparation, conferencing, and process reviews
- Reporting, subcontracting, recording, and accounting
- Staffing and supervision
- Federal-aid project records and accounting
- Control of materials
- Quality assurance programs
- Control/scope of work
- Legal relations and responsibilities
- Public relations
- Prosecution and progress
- Labor compliance and equal opportunity
- Disadvantage business enterprises
- Deficiencies and sanctions; claims and claim avoidance
- Tort liability

Attendees will learn how to efficiently manage a project from beginning to completion in compliance with state regulations. Sessions covering labor and equal opportunity regulations and compliance, claims avoidance and resolution, and tort liability will address the legal aspect of the Resident Engineer’s role.
LOCAL ASSISTANCE RESIDENT ENGINEER (RE) ACADEMY (PD-04)

COURSE OUTLINE

Day One

• RE Roles & Responsibilities

Day Two

• Environmental & SWPPP/WPC
• Control of Work
• Scope of Work, Safety & Traffic Control

Day Three

• Control of Material
• Labor Compliance

Day Four

• Claims & Claim Avoidance
• Contract Change Order
• Project Completion and Invoicing

Day Five

• Local Agency/RE Liability
# Course Agenda

## Day One

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Presenter</th>
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<tbody>
<tr>
<td>12:00 PM – 1:00 PM</td>
<td>LUNCH (on your own) Registration</td>
<td>Rick Gifford</td>
</tr>
<tr>
<td>1:00 PM – 1:20 PM</td>
<td>Welcome &amp; Introductions Course Outline/Definitions  Self Introduction/Course Introduction</td>
<td>Rick Gifford</td>
</tr>
<tr>
<td>1:20 PM – 1:30 PM</td>
<td><strong>Chapter 1 - RE Roles &amp; Responsibilities</strong></td>
<td>Rick Gifford</td>
</tr>
<tr>
<td>1:30 PM – 2:10 PM</td>
<td>Staffing/Consultants and Supervision</td>
<td>Rick Gifford</td>
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<tr>
<td>2:10 PM – 2:20 PM</td>
<td>BREAK</td>
<td></td>
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<tr>
<td>2:20 PM – 3:00 PM</td>
<td>Pre-Construction Preparation Documents, Checklists &amp; Files</td>
<td>Rick Gifford</td>
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<tr>
<td>3:00 PM – 3:10 PM</td>
<td>BREAK</td>
<td></td>
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<tr>
<td>3:10 PM – 4:00 PM</td>
<td>Process Reviews &amp; Oversight</td>
<td>Ken Darby - COE</td>
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<tr>
<td>4:00 PM – 5:00 PM</td>
<td>FHWA &amp; OIG</td>
<td>Karen Bobo - FHWA</td>
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<td>Donald Reince – OIG</td>
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## Day Two

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 AM – 8:45 AM</td>
<td><strong>Chapter 2 - Environmental &amp; SWPPP/WPC</strong></td>
<td>Rick Gifford</td>
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<tr>
<td>8:45 AM – 9:15 AM</td>
<td>Public (and other) Relations</td>
<td>Rick Gifford</td>
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<tr>
<td>9:15 AM – 9:40 AM</td>
<td>Public Relations Workshop &amp; BREAK</td>
<td>Students</td>
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<tr>
<td>9:40 AM – 10:00 AM</td>
<td>Public Relation Workshop – Presentations</td>
<td>Students</td>
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<tr>
<td>10:00 AM – 11:00 AM</td>
<td><strong>Chapter 3 - Control of Work</strong></td>
<td>Rick Gifford</td>
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<td>Engineer’s Daily Reports, Subcontractors, Construction Records, and Accounting Procedures</td>
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<tr>
<td>11:00 AM – 11:10 AM</td>
<td>BREAK</td>
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<tr>
<td>11:10 AM – 11:50 AM</td>
<td>Contract Administration</td>
<td>Rick Gifford</td>
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<tr>
<td>12:00 PM – 1:00 PM</td>
<td>LUNCH</td>
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<tr>
<td>1:00 PM – 1:50 PM</td>
<td>Contract Time</td>
<td>Rick Gifford</td>
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<tr>
<td>1:50 PM – 2:10 PM</td>
<td>Contract Time Exercise &amp; BREAK</td>
<td>Students</td>
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<tr>
<td>2:10 PM – 2:20 PM</td>
<td>Contract Time Exercise – Discussion</td>
<td>Students</td>
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<tr>
<td>2:20 PM – 3:10 PM</td>
<td><strong>Chapter 4 - Scope of Work, Safety/Traffic Control</strong></td>
<td>Rick Gifford</td>
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<td>3:10 PM – 3:20 PM</td>
<td>BREAK</td>
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<tr>
<td>3:20 PM – 4:10 PM</td>
<td>Measurement/Payment</td>
<td>Rick Gifford</td>
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<td>4:10 PM – 4:30 PM</td>
<td>Measurement/Payment Exercise &amp; BREAK</td>
<td>Students</td>
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<tr>
<td>4:30 PM – 5:00 PM</td>
<td>Measurement/Payment Exercise &amp; Discussion</td>
<td>Students</td>
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LOCAL ASSISTANCE RESIDENT ENGINEER (RE) ACADEMY (PD-04)

COURSE AGENDA (continued)

Day Three
8:00 AM – 12:00 PM  Chapter 5 - Control of Material  Don Roberts
12:00 PM – 1:00 PM  LUNCH
1:00 PM – 1:30 PM  Control of Material – Exercise  Students
1:30 PM – 2:00 PM  Control of Material – Presentations  Don Roberts
2:00 PM – 2:10 PM  BREAK
2:10 PM – 3:20 PM  Chapter 6 - Labor Compliance  Rick Gifford
3:20 PM – 3:30 PM  BREAK
3:30 PM – 5:00 PM  DBE & EEO  Rick Gifford

Day Four
8:00 AM – 12:00 PM  Chapter 7 - Claims & Claim Avoidance  Fred Graebe
12:00 PM – 1:00 PM  LUNCH
1:00 PM – 2:30 PM  Chapter 8 – Contract Change Order  Rick Gifford
2:30 PM – 3:00 PM  BREAK & CCO Exercise  Students
3:00 PM – 3:40 PM  CCO Exercise – Presentations
3:40 PM – 3:50 PM  BREAK
3:50 PM – 5:00 PM  Chapter 9 - Project Completion & Invoicing  Rick Gifford
Deficiencies and Sanctions

Day Five
8:00 AM – 12:00 PM  Chapter 10 - Local Agency/RE Liability  Gordon Baca
12:00 PM  Evaluations/Academy completed  Rick Gifford
LUNCH on your own