



**DIVISION OF
LOCAL ASSISTANCE**
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Local Assistance Training Day

Date: June 7, 2022

Time: 8:30 am – 12:30 pm

On-line via Zoom

| Meeting Hosted by: | Caltrans HQ Division of Local Assistance, Chief Dee Lam CalRTPA Group, Chair Dawn Vettese | |
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| Meeting Facilitated by: | Caltrans HQ DLA, Office of Environmental Compliance and Outreach Neil Peacock | |
| Attendees: | RTPA Group Members, Local & Tribal Agencies, Partners, Interested Parties | |
| Time | Topic | Presenter |
| 8:30 am | Welcome & Agenda | - Neil Peacock, Senior Planner |
| 8:35 am | <u>Leadership Message:</u> Accomplishments | - Dee Lam, DLA Division Chief - Dawn Vettese, RTPA Chair |
| 8:40 am | <u>Information Sharing:</u> Office of State Programs; Resources Office of Federal Programs; Updates LTAP & CTAP Trainings | - Cathy McKeon, Chief, Office of State Programs - Robert Peterson, Chief, Office of Federal Programs - Sherri Graham, DLA Training & Marketing Coordinator |
| 9:20 - 9:25 am | 5-Minute Break | |
| 9:25 am | <u>Overview:</u> Local Public Agency (LPA) Indirect Cost Allocation Plan (ICAP) Submission & Review | - Gerald Lee, Audit Manager, Caltrans Internal Audits Office |
| 9:55 am | <u>Overview:</u> LPA ICAP Submissions 2021-22 Stats, ICAP/ICRP Audits, Common Findings & Best Practices | - Daniel Burke, Supervisor, Program Reviews & Outreach, DLA |
| 10:15 am | <u>Overview:</u> Financial Document Review Process for A&E Consultants | - David Wong, Audit Chief, Independent Office of Audits and Investigations - May delegate to another staff |
| 10:35 – 10:45 am | 10-Minute Break | |
| 10:45 am | <u>Overview:</u> Chapter 10: Exhibit 10C, High-Risk Items | - Bing Luu, Procurement Oversight Program Manager, Office of Guidance & Oversight |
| 11:05 am | <u>Overview:</u> Final Invoice & Final Report of Expenditures | - Jim Day, Associate Planner, District 3 |
| 11:25 - 11:35 am | 10-Minute Break | |
| 11:35 am | <u>Best Practice Peer-Exchange:</u> Regional Project Delivery Coordination | - Jose Luis Caceres, Analyst, SACOG |
| 12:25 – 12:30 pm | <u>Closing Comments:</u> Survey; Next Event, September 8 th | - Neil Peacock, Senior Planner |