



CPMCA

California Plumbing & Mechanical
Contractors Association

Seminar Catalog

**January–June
2017**

**Computer Skills/Technology • Estimating • Foreman Training
Management • People Management/Skills • Project Management
Sales/Service/Safety • Certified Safety Online Courses • Webcasts**

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CPMCA Executive Committee, Board of Directors and Staff

Executive Committee 2016–2017

Steve Cornelius, President
University Mechanical & Engineering
Contractors – San Diego

David Quirk, Vice-President
Performance Mechanical, Inc.

Jim DeFlavio, Secretary
Murray Co.

Tim Healy, Treasurer
ARB, Inc.

Rick Moreno, Past President
Astro Mechanical Contractors, Inc.

Board of Directors Term Ending 12/31/2017

Scott Burson
Xcel Mechanical Systems, Inc.

Mike Davis
H.L. Moe Company, Inc.

Tom Finell
Southland Industries

Bryan Suttles
Suttles Plumbing & Mechanical Corporation

Larry Verne
Verne's Plumbing, Inc.

Board of Directors Term Ending 12/31/2018

Mark Felio
Paul Hansen Equipment, Inc.

Steve Fosdick
Murray Co.

Pete Fortin
ACCO Engineered Systems

Jay Lusita
Tier One Plumbing

Dan Naylor
Kinetics

Randy Stewart
Pan-Pacific Mechanical

Education Committee

Harry Bederian – Chairperson
ARB, Inc.

Shaabini Alford
Murray Co.

Travis Craven
All Area Plumbing, Inc.

Beni Monaco
All Area Services, Inc.

Bryan Suttles
Suttles Plumbing & Mechanical Corporation

Bill Thompson
Meadows Mechanical

CPMCA Staff

Chip Martin
Executive Director

Michelle Lynn
Director of Education

Dana Giambalvo
Office Manager

Letter from the Executive Director



We are delighted to present CPMCA's 10th semi-annual Seminar Catalog featuring classes January – June 2017. A New Year brings new goals and aspirations so get 2017 off to a strong start! We encourage you to browse through this brochure and highlight courses that speak to your company, position or department. CPMCA continues to pride itself in offering seminars in many areas of training with one goal in mind; for the overall betterment of our contractors and their workers in Southern California.

In 2016 we didn't fall short of our 6-year running trend, attracting over 1,000 contractor members, their staff and Affiliate/Associate members to this educational program. Courses in the area of project management, leadership, project management, foreman training, profitability, computer skill training, etc., are collectively meant to keep members contractors and their staff ahead of the curve with skills needed to thrive in the plumbing/mechanical industry. In 2016 we also successfully closed out CPMCA's 2nd state-funded grant under the ETP, Employment Training Panel with the participation and support of many members; we thank you! The Panel provides funding to businesses "to assist in upgrading the skills of workers through training that leads to good paying, long-term jobs". This state program continues to give credibility and recognition to our first-in-class educational program providing an added value to the Mechanical Contracting Industry and allowing the association to funnel state funding into continued program development.

We are confident that within this course catalog you will find presentation topics that are relevant and important to your personal and professional growth and overall success in the industry. We welcome you to attend as many seminars as fit your interest and career. See you at the next one!

CPMCA Mission Statement

The mission of CPMCA is to provide representation of its members to enhance their business and profitability through education and labor relations. This Association will provide a partnership for progress between Labor and Management; setting aside differences, to unite in the common goal of expanding the market share of the union mechanical contracting industry.

Vision Statement

CPMCA is the organization of choice, a progressive leader and voice for the union plumbing and mechanical contracting industry in Southern California, providing business opportunities, education, fair employment, honesty, integrity and family values.

Goal & Guarantee

Our goal is to offer a comprehensive first-in-class educational program unparalleled in the industry which will continue to advance the professional, technical and managerial skills of our member contractors and their employees. If you are not fully satisfied with a particular program, we will gladly provide a full refund.

SCHEDULE AT A GLANCE BY MONTH

The following is a list of classes offered during the first half of 2017.

January

- 11 Microsoft Outlook 2016 - Part 1
- 13 Learning, Leading and Leaving a Legacy
- 19 Growing and Developing Supervisors
- 25 Microsoft Outlook 2016 - Part 2

February

- 2 Bluebeam Training Basics – Day 1
- 9 Bluebeam Training Advanced Workflows – Day 2
- 17 & 18 Project Management Days 9 & 10

March

- 15 Successful Business Communications – It Begins at the Beginning
- 22 Microsoft Excel 2016 – Part 1
- 31 Project Management Day 11

April

- 1 Project Management Day 12
- 5 Microsoft Excel 2016 – Part 2
- 6 Sexual Harassment Prevention Training
- 12 HR – 101
- 27 Microsoft Excel 2016 – Part 3

May

- 3 Mechanics Lien Law
- 5 How to Be a More Effective Foreman
- 12-13 Basic Methods of Estimating; 2-Day Program
- 19 Speak to Persuade

June

- 22 Technology and Transparency – The Future of Construction

Anytime – Webcasts

- Active Listening
- BIM 101
- Excel: Excel Solver Procedure
- Excel: Insert Excel Sheet into Word
- Excel: Microsoft Word fill-In Forms
- Excel: Summarizing Data with Subtotals in Excel
- Going Green – Valuable Opportunities for Mechanical Contractors
- Green Building: LEED Certification “So You Want to be a Green Contractor”
- Green Building: LEED Certification and Sustainable Design
- Mechanical Estimating Techniques
- Microsoft Office 2007 Excel
- Microsoft Office 2007 Overview
- PowerPoint: Introduction to PowerPoint 2007
- Retro-Commissioning
- Water Efficiency and How It Relates to Green Building

Computer Skills & Technology

- Microsoft Outlook 2016 – Part 1
Wednesday, January 11, 2017
- Microsoft Outlook 2016 – Part 2
Wednesday, January 25, 2017
- Bluebeam Training Basics – Day 1
Thursday, February 2, 2017
- Bluebeam Training Advanced Workflows –
Day 2
Thursday, February 9, 2017
- Microsoft Excel 2016 – Part 1
Wednesday, March 22, 2017
- Microsoft Excel 2016 – Part 2
Wednesday, April 5, 2017
- Microsoft Excel 2016 – Part 3
Wednesday, April 27, 2017

Estimating

- Basic Methods of Estimating; 2-Day Program
Fri & Sat, May 12 & 13, 2017

Foreman

- How to Be a More Effective Foreman
Friday, May 5, 2017

Management

- Learning, Leading and Leaving a Legacy
Friday, January 13, 2017
- Mechanics Lien Law
Wednesday, May 3, 2017
- Technology and Transparency – The Future of
Construction
Thursday, June 22, 2017

People Management/Skills

- Growing and Developing Supervisors
Thursday, January 19, 2017
- Successful Business Communications – It
Begins at the Beginning
Wednesday, March 15, 2017

- HR – 101
Wednesday, April 12, 2017
- Speak to Persuade
Friday, May 19, 2017

Project Management

- Project Management Days 9 & 10
Fri & Sat, February 17 & 18, 2017
- Project Management Days 11 & 12
Fri & Sat, March 31 & April 1, 2017

Sales/Service/Safety

- Sexual Harassment Prevention Training
Thursday, April 6, 2017
- ClickSafety Online Courses
Anytime! Available 24/7

Webcasts

- Active Listening
- BIM 101
- Excel: Excel Solver Procedure
- Excel: Insert Excel Sheet into Word
- Excel: Microsoft Word fill-In Forms
- Excel: Summarizing Data with Subtotals in
Excel
- Going Green – Valuable Opportunities for
Mechanical Contractors
- Green Building: LEED Certification
“So You Want to be a Green Contractor”
- Green Building: LEED Certification and
Sustainable Design
- Mechanical Estimating Techniques
- Microsoft Office 2007 Excel
- Microsoft Office 2007 Overview
- PowerPoint: Introduction to PowerPoint 2007
- Retro-Commissioning
- Water Efficiency and How It Relates
to Green Building

*and many more – please see www.cpmca.org
for complete listing*

IMPORTANT EVENTS



Plan Accordingly! Take note of these important MCAA Events:

IPM Class 64, Week 2

January 15-19, 2017

Advanced IPM – Class 13

January 22-27, 2017

Safety Directors' Conference - Clearwater Beach, FL

January 24-26, 2017

MCAA Annual Convention - San Diego, CA

March 5-9, 2017

NCPWB Spring Technical Committee Meeting

April 23-26, 2017

IPM Class 65, Week 1 – Austin, TX

April 23-27, 2017

IPM Class 66, Week 1 – Austin, TX

April 24-28, 2017

National Issues Conference – Washington, DC

May 2-4, 2017

Field Leaders Conference – Denver, CO

May 10-12, 2017

Fabrication Conference – Salt Lake City, UT

May 17-19, 2017

MCAA Contacts:

Please call MCAA directly for additional information on any of their events @ 301-869-5800.

For conference & conventions, contact Cynthia Buffington @ cbuffington@mcaa.org.

For Advanced Leadership Institute, contact Dennis Langley @ dlangley@mcaa.org.

For educational classes & IPM, contact Beth Miller @ bmiller@mcaa.org.

For online webcasts & conferences, contact Sean McGuire @ smcguire@mcaa.org.

For online webcasts & MSCA, contact Barbara Dolim @ bdolim@mcaa.org.

Plan Accordingly! Take note of these important CPMCA Events:



CPMCA Annual Golf Tournament – Oakmont Country Club, Glendale, CA Thursday, May 15, 2017

CPMCA Contacts:

For educational classes, contact Michelle Lynn at Michelle@cpmca.org or 818-275-2893.

For meetings, retreats, and all other events, contact Dana Giambalvo at dana@cpmca.org or 818-275-2890.



Michael Breeden brings a passion for technology and training to every class he leads. He has years of experience developing technology curriculum for teachers, and leading trainings to assist educational leaders in making the most of new technology. Now focused on the AEC industry, Michael delivers inspired software training to help both beginning and advanced users incorporate more efficient paperless workflows.



Kathryn Crosby is the President of C2 Consulting, Inc., a firm that provides financial, safety, and other consulting services and training. Prior to starting her own business, she was Vice President/CFO for a Utah-based commercial and industrial mechanical contractor. She served on the Mechanical Contractors Association of America (MCAA) National Board of Directors and was Chairperson of the Project Managers Education Committee charged with oversight of the Institute of Project Management at the University of Texas—Austin. She currently serves on the faculty for the Institute of Project Management, Construction Education Institute, MCAA's National Education

Initiative and the United Association's Instructor Training Course in Ann Arbor, Michigan.

In addition to developing and implementing custom training and procedure programs for individual companies, C2 co-authored the MCAA Project Manager Manual and developed an industry specific foreman training curriculum for the Western Insulation Contractors Association. They co-authored the United Association's (UA) Certified Foreman course, and have developed many other training modules for the UA.



Kevin L. Dougherty has been speaking to the construction industry for the past 27 years. Kevin represents a changing industry – aggressive, realistic, and open-minded. Kevin's work and education experience enables him to relate to today's problems and provides tangible solutions in an easy-to-listen style. He has taught thousands of people in various seminars. His client base ranges from family-owned businesses to corporate conglomerates. In addition to speaking and writing articles, Kevin has served as sales manager and corporate trainer for a multimillion-dollar mechanical contractor and specialty services contractor.

Kevin has also been a frequent speaker for various PHCC, ISA SBA, SMACNA, MCAA, MSCA, NECA, SMWIA, U.A., QSC, and numerous other trade associations and locals. Kevin's humorous and energetic speaking style has made him a convention favorite. He has spoken to such groups as Benjamin Moore & Co., 3M, Johnson Controls, W.R. Grace, Ferguson Enterprises, Morton International, Manville/Schuller, York International, and Hagemeyer Electrical Australia, The National Labor College just to name a few. Kevin's ability to entertain audiences and hold their interest while getting his message across consistently makes him one of the industries top speaking and training talents.



NEW SPEAKER! **Jennifer Raphael Komsky** earned her B.S. in 1994 from the University of California, Santa Barbara and earned her J.D. degree in 1997 at the University of the Pacific, McGeorge School of Law. She was admitted to the State Bar in 1997. Jennifer successfully defends employers in all phases of litigation before State and Federal Courts and administrative agencies. She also provides advice and guidance for litigation defense and avoidance.



John R. Koontz has over 30 years of wide-ranging mechanical industry experience that includes contracting, academics, and consulting. He is a former Tenured Associate Professor in Purdue University's Department of Building Construction Management. He is also the founder and former director of Purdue's Mechanical Construction Management Specialization Program. In addition to his academic career, he spent 15 years in the employment of MCAA contractors in a variety of positions including senior project manager, project manager, project engineer, and estimator and is the founder of the 1st ever MCAA student chapter which was started at Purdue in 1993. Professor Koontz's family heritage of long-term UA family members (grandfather, great uncle, and father) provides a sincere and deep-rooted pride, interest, and concern for the future success and survival of all parties involved in union mechanical construction. .



NEW SPEAKER! **Stephane A. McShane** is a Director at Maxim Consulting Group responsible for the evaluation and implementation processes with our clients. Stephane works with construction related firms of all sizes to evaluate business practices and assist with management challenges. With a large depth of experience working in the construction industry, Stephane is keenly aware of the business and, most specifically, operational challenges that firms face. Her areas of expertise include: Leadership development, executive coaching, organizational assessments, strategic planning, project execution, business development, productivity improvement, and training programs. Mrs. McShane is an internationally recognized speaker, mentor, author, and teacher. Her ability to motivate, inspire, and create confidence among your work groups is extremely rare and very effective.



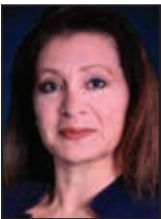
Keith A. Rahn is a faculty member (Assistant Professor) at Auburn University in the McWhorter School of Building Science. He served as an Instructional Assistant Professor at Illinois State University for 9 years in the Construction Management program. Mr. Rahn has taught classes in mechanical and electrical systems, project management & administration, estimating & project scheduling and construction material & methods. In 2007, the MCAA presented him with the "Educator of the Year" award at the national convention. With 15 years of mechanical industry experience in estimating, project management and ownership with MCAA contractors, his industry knowledge coupled with his educational background provides an unparalleled classroom experience



Joe Sullivan holds over a decade of experience as an educator and trainer to both adults and high school students. He excels at translating highly technical information into training curriculums that can be grasped and mastered by any student. For the past four years he has consulted with some of the most innovative architecture, engineering and construction firms in the US, helping them improve their workflows with Revu's intuitive features and functionality. Joe has spent the last few years providing hands on training to help AEC professionals learn to use Revu. He received an MFA from the University of California, Riverside.



Theresa Crawford Tate is a partner in the firm of Crawford & Bangs. Her legal practice for the last 23 years has focused on construction contracts, claims and litigation. Crawford & Bangs is a small firm that specializes in all aspects of construction law. Ms. Tate graduated with honors from both the California State University at Fullerton and Loyola Law School. Ms. Tate is admitted to practice before all the state courts of California and the U.S. District Court for the Central District. Ms. Tate has been actively involved with many trade associations, including the Orange County Chapter of the Construction Financial Management Association (CFMA), Real Property Section of the Los Angeles County Bar (LACBA), Building Industry Association (BIA), and Orange Empire Sheet Metal & Air Conditioning Contractor's National Association (SMACNA). Ms. Tate is a frequent author and speaker on construction related topics, and her articles, as well as those authored by other members of her firm, are posted on the Crawford & Bangs website at www.BuildersLaw.com.



NEW SPEAKER! Roxana E. Verano is a twenty-year veteran of employment law. Roxana Verano knows that happy employees do not need Unions to protect them. She enjoys working closely with employers to help them run efficient, Union- free businesses with satisfied employees. On a daily basis, she counsels and trains clients in Employment Law so they can remain in compliance and avoid legal problems from arising in the first place. Her Spanish-speaking clients appreciate her fluency in Spanish when they need services ranging from Employee Handbooks to witness interviews..



NEW SPEAKER! John Zulli, Ph.D. believes in the extraordinary capacity of the human mind. He has seen his practical approach to improving performance and enhancing life skills literally transform ordinary people into extraordinary achievers. Whether the individuals under his tutelage are PGA contenders, sales reps, or patients struggling to master chronic pain, John helps his audience reach deep within themselves and overcome all obstacles to success. This powerful presenter and motivator got his professional start as a park ranger in California. It was while striving to draw outstanding performance out of his fellow law enforcement officers, each working under high stress and multiple demands, that he discovered his true calling in life: to train others. After almost a decade in law enforcement, he boldly left to begin his career in training, counseling, and helping others draw out their best selves. Today, John is one of the foremost motivational speakers in America. He has helped companies save millions of dollars by reducing injuries, increasing productivity, and reigniting morale. An amazing 98 percent of the 50,000 employees who have trained with John Zulli rated him "excellent." More important than this, today these men and women are living, breathing testimonials to the power of the human spirit to change for the better.

COMPUTER SKILLS/TECHNOLOGY

Bluebeam Training Basics – Day 1

Michael Breeden & Joe Sullivan

Thursday, February 2, 2017

7:30 a.m. – 3:30 p.m.

Member: Free

Non-Member: \$299

Bluebeam Technology – Basics

This is the first segment of a 2-day program in which you'll learn the basics of Bluebeam Revu!

“Be better - Work Smarter - PDF technology for working without limits.” Bluebeam technology is a desktop solution that provides PDF creation, markup, editing and collaboration for the construction industry! Come learn about the Revu Core Basics: Revu Interface, Navigation & Customizable Profiles, Document Editing and Management, Markup Tools/Tool Chest, Markups List, and Collaboration using Studio Session & Projects.



Bluebeam Training Advanced Workflows – Day 2

Michael Breeden & Joe Sullivan

Thursday, February 9, 2017

7:30 a.m. – 3:30 p.m.

Member: Free

Non-Member: \$299

Bluebeam Technology – Advanced Workflows

This seminar is a continuation of training, building upon the functions and features covered in Day 1. Attendees are strongly encouraged to attend both sessions.

“Be better - Work Smarter - PDF technology for working without limits.” Bluebeam technology is a desktop solution that provides PDF creation, markup, editing and collaboration for the construction industry! This session builds upon the skills and functions covered in Basics. Come learn about some more advanced workflows, tools and features in Revu! Session will include: Takeoffs & Estimation and managing changing and revisions with our Document Control features.

Microsoft Excel 2016 – Part 1 (of 3)

New Horizons Computer Learning Center – Anaheim

Wednesday, March 22, 2017

8:00 a.m. – 4:00 p.m.

Member: Free

Non-Member: \$299

This course is intended for students who wish to gain the foundational understanding of Microsoft Office Excel 2016 that is necessary to create and work with electronic spreadsheets. To ensure success, students will need to be familiar with using personal computers and should have experience using a keyboard and mouse. Students should also be comfortable working in the Windows® 10 environment and be able to use Windows 10 to manage information on their computers. Specific tasks the students should be able to perform include: opening and closing applications, navigating basic file structures, and managing files and folders. Upon successful completion of this course, you will be able to create and develop Excel worksheets and workbooks in order to work with and analyze the data that is critical to the success of your organization. You will: Get started with Microsoft Office Excel 2016. Perform calculations. Modify a worksheet. Format a worksheet. Print workbooks. Manage workbooks. The journey doesn't stop here; continue building on your skills and attend Excel 2016 Part 2!

Microsoft Excel 2016 – Part 2 (of 3)

New Horizons Computer Learning Center – Anaheim

Wednesday, April 5, 2017

8:00 a.m. – 4:00 p.m.

Member: Free

Non-Member: \$299

To ensure success, students should have completed Microsoft® Office Excel® 2016: Part 1 or have the equivalent knowledge and experience. This course is designed for students who already have foundational knowledge and skills in Excel 2016 and who wish to begin taking advantage of some of the higher-level functionality in Excel to analyze and present data. Upon successful completion of this course, you will be able to leverage the power of data analysis and presentation in order to make informed, intelligent organizational decisions. You will: Work with Functions Work with Lists Analyze Data Visualize Data with Charts. Create advanced formulas. Analyze Data with PivotTables and PivotCharts. The final stop, Excel 2016 Part 3 is just around the corner! Be sure to enroll and complete the full 3-part series.



COMPUTER SKILLS/TECHNOLOGY

CONTINUED

Microsoft Excel 2016 – Part 3 (of 3)

New Horizons Computer Learning Center – Anaheim

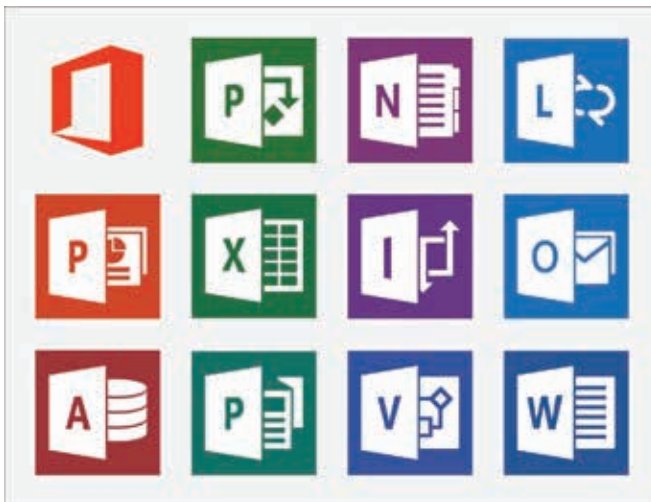
Wednesday, April 27, 2017

8:00 a.m. – 4:00 p.m.

Member: Free

Non-Member: \$299

This course builds off the knowledge presented in the Microsoft® Office Excel® 2016: Parts 1 & 2 courses to help you get the most of your Excel experience! To ensure success, students should have practical, real-world experience creating and analyzing datasets using Excel 2016. Specific tasks students should be able to perform include: creating formulas and using Excel functions; creating, sorting, and filtering datasets and tables; presenting data by using basic charts; creating and working with PivotTables, slicers, and PivotCharts; and customizing the Excel environment. This course is intended for students who are experienced Excel 2016 users and have a desire or need to advance their skills in working with some of the more advanced Excel features. Students will likely need to troubleshoot large, complex workbooks, automate repetitive tasks, engage in collaborative partnerships involving workbook data, construct complex Excel functions, and use those functions to perform rigorous analysis of extensive, complex datasets.



Basic Methods of Estimating; 2-Day Program

Keith A. Rahn

Friday & Saturday, May 12 & 13, 2017

7:30 a.m. – 3:30 p.m.

Member: Free

Non-Member: \$179

Basic Principles & Methods of Estimating: Part 1

Role of the Estimator: Investigates how bid strategies are developed for companies and how Estimators implement that strategy. We will look at bidding documents and procedures for evaluating the project; such as procurement, analyzing/visualization, pre-bid conference, addendums and preparing bid documents.

Take-off and Pricing in the relationship to the Project Delivery System: The way we take-off and price the project is determined by the project delivery system the owner is using. We will examine the different P.D.S. and how it affects the bid.

Effective Estimate Procedures: Gain an understanding of proper procedures and organization of putting an estimate together. Topics included are stripping off material and equipment, material/equipment pricing sheets, and final bid summary documentation. Attendees will be presented with a project to practice estimate techniques learned.

Basic Principles & Methods of Estimating: Part 2

Sub-Contractor and Vendor Coordination: Early in the bidding process your sub-contractors and vendors need to be identified. Coordinating their scope of work is extremely important to developing a competitive bid.

Finalizing the Estimate: Attendees will apply previously learned estimate techniques to their own project estimate given in the class. Bid time pressure and how to better control them will be discussed.

Delivering the Bid: A good competitive price and a well written proposal is essential to getting to work. We will look at developing a clear scope of work and a professionally formatted proposal letter.



FOREMAN TRAINING

How to Be a More Effective Foreman

Kevin L. Dougherty

Friday, May 5, 2017

7:30 a.m. – 3:30 p.m.

Member: Free

Non-Member: \$179

Get your foreman to become more focused on the importance of managing the job!

Interested in improving your communication skills, and being more productive? This program covers proven conflict resolution techniques, communication skills, productivity enhancement, motivational tactics, time management ideas and many more skills that a foreman needs in order to thrive today. This program is designed to help anyone who manages people; from the new foreman to the experienced veteran, all attendees will come away with tools that will make an immediate impact on job performance.

MANAGEMENT

Learning, Leading and Leaving a Legacy

Mark Matteson

Thursday, January 13, 2017

7:30 a.m. – 2:30 p.m.

Member: Free

Non-Member: \$179

Who Should Attend?! CEO's, Presidents, Owners, Project Managers, Service Managers and anyone in a leadership position will profit from this powerful seminar!

If your job is to answer "Where is this bus going? Who is on the Bus? Are they in the right seat?" AND move people into action, influence others to improve their attitudes, persuade people to change, grow, adapt, this seminar is for you!

What Will You Takeaway? This 6-hours will change your life and business. You can expect:

- Tools for Change (How to Go From Here to There in Less Time)
- How to Deal with An Angry Customer (and NOT give away the farm!)
- The Art of Delegation (getting more done WITH others!)
- How to Change Others Behavior (by Able Example)
- Pygmalion Principle ("Treat me as I am, I remain. Treat me as I can be, I become!")
- The 10-Commandments of Great Managers
- Doing First Things First, One Thing at a Time, Finish What You Start
- People Skills 101
- On Learning, Leading and Leaving a Legacy

Mechanics Lien Law

Theresa Crawford Tate

Wednesday, May 3, 2017

12:00 p.m. - 2:30 p.m.

Member: Free

Non-Member: \$179

For contractors, the success of collection efforts is often dependent upon a valid Mechanics Lien, Stop Payment Notice or Payment Bond claim. If you ever rely on these payment remedies or you regularly complete statutory release forms, then you absolutely must know about the Mechanics Lien statutes. This presentation will review the proper procedures for completing and serving these documents: Preliminary Notice, Mechanics Lien, Stop Payment Notice and Statutory Release Forms.

Technology and Transparency – The Future of Construction

Stephane A. McShane – NEW SPEAKER!

Thursday, June 22, 2017

7:30 a.m. – 3:30 p.m.

Member: Free

Non-Member: \$179

Identifying the tools and technology needed to best position your organization for a successful future can sometimes be daunting. During this session, we will discuss why these tools are critical to future profitability as well as examples of ERP systems, Project Management software, Production Tracking solutions, and Purchasing solutions. Additionally, we will show examples of the reports and metrics necessary to provide transparency on performance so that challenges can be identified early enough to effect a change to minimize financial losses and maximize margin gains.

The why. We will:

- Discuss what is driving this need to change
- Explore the value of what this information provides
- Define the levels of the organization that benefit from this change

The how: We will:

- Evaluate what type of core ERP is needed
- Discuss software implementation strategies
- Compare integrated vs. stand-alone project management solutions
- Define what production tracking methods are preferred
- Learn to maximize purchasing power and negotiate favorable terms
- Review reports and dashboards based on the needs of the user

PEOPLE MANAGEMENT/SKILLS

Growing and Developing Supervisors

Kevin L. Dougherty

Thursday, January 19, 2017

7:30 a.m. – 3:30 p.m.

Member: Free

Non-Member: \$179

Looking for the perfect supervisor? Maybe you don't need to look very far...

If you want to develop men and women into managers, or perhaps want to work on your own supervisory skills, this seminar can help. Geared towards anyone who manages people, including foremen, owners, and project managers, this real-world presentation has been used to train over 10,000 supervisors in leadership, transition to management, problem-solving, and ending communication conflict.

Successful Business Communications – It Begins at the Beginning

Kathryn Crosby

Wednesday, March 15, 2017

7:30 a.m. – 4:30 p.m.

Member: Free

Non-Member: \$179

Virginia Satir said “Once a human being has arrived on this earth, communication is the largest single factor determining what kinds of relationships he makes with others and what happens to him in the world about him.” During this course attendee will learn the critical role various forms of communication play in relationships, and in the image and success of individuals, projects and the company. Clear and concise communication can reduce the chance of misunderstandings and conflict.

Participants will do an assessment on their personal communication style so they can manage it, develop a communication system for their area of responsibility, draft and present to the class a self-introduction, have a discussion on the impact all forms of communication have on the image of the company, how to vary communication style and methods for the receiver, and the art of listening to increase understanding. Also discussed will be tips on how to keep communication clear and easy to navigate for the receiver, no matter what method is chosen, layout and format of emails, choosing a subject line that is compelling, and the “Rule of Ones.”

HR-101

Roxana E. Verano, Esq. – NEW SPEAKER!

Wednesday, April 12, 2017

12:00 p.m. – 1:30 p.m.

Member: Free

Non-Member: \$179

California Employers continue to be under attack in Wage and Hour litigation. In this presentation, veteran employment law attorney, Roxana Verano, will discuss the most common mistakes made by employers that lead to costly litigation while focusing on significant changes in the law.

Wage and Hour Compliance in California: Bad Habits of the Frequently Sued Employer

- Employee vs. Independent Contractor Status
- Exempt vs. Non-Exempt Classification
- Overtime Rules and Calculating the Regular Rate
- Commission Agreements
- Travel Time
- Meal Periods, Waivers and On Duty Meal Agreements
- Compliance with Wage Statements Requirements
- Final Pay Rules

Speak to Persuade

John Zulli, Ph.D. – NEW SPEAKER!

Friday, May 19, 2017

7:30 a.m. – 4:30 p.m.

Member: Free

Non-Member: \$179

This seminar is designed to provide participants with the information and tools necessary to speak persuasively and effectively! Learn how to master the elements of persuasion; use word choice and order effectively; and convey a powerful message through vocal variety, visual impact, and body language. Participants also will learn how to create an environment conducive to persuasive communication as well as how to troubleshoot common problems encountered when trying to persuade others.

Who Should Attend? Whether you are a manager or a front-line employee, this seminar will provide you with the tools you need to get your message across effectively and with the desired results.

- Determine what makes communication persuasive.
- Organize a persuasive presentation.
- Demonstrate the vocal variety necessary to keep the interest of an audience.
- Control your body language to ensure that it conveys your desired message.
- Develop effective visual aids.
- Establish the appropriate environment for your persuasive communication.
- Troubleshoot a variety of common presentation-related problems.

PROJECT MANAGEMENT

Project Management 9 & 10

John R. Koontz

Fri & Sat, February 17 & 18, 2017

7:30 a.m. – 4:30 p.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

- **Value-Based Mechanical Project Management:** Learn the techniques and strategies used by the best mechanical project managers for setting themselves and their companies apart from their peers and their competitors. Project managers who attend this session and implement the concepts will see a significant improvement in their value to their customers and to their employers.
- **Managing the Risk of Owner Furnished Equipment:** In today's marketplace, mechanical contractors are likely to find themselves with a customer who has pre-purchased most of the major equipment items on a project and tailored their contract documents to place all of the equipment risk on the mechanical contractor. Projects that include owner furnished equipment (OFE) must be managed differently to help mitigate this risk. This session will have special emphasis on planning, documentation, communication, and claim avoidance.
- **Profitably Managing Your Subcontractors:** Subcontractors represent a significant portion of most mechanical contracts, and the performance of your subcontractors is a direct reflection of your own performance in the eyes of an owner, construction manager, or general contractor. The project manager's effective management of subcontractors ensures a successful project that is profitable, completed on time, and completed within budget.
- **Successful Survival of Project Closeout:** The end of a project is usually a challenging and difficult time for the mechanical project manager and the foreman. Unfortunately, there is no magic formula, wand, or pill for eliminating the difficulty of project closeout. There are, however, several tactics and strategies the project manager and foreman can implement to improve end-of-job performance and mitigate the difficulties of project closeout.



Project Management 11 & 12

John R. Koontz

Fri & Sat, March 31 & April 1, 2017

7:30 a.m. – 4:30 p.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

- **Basic Construction Law Concepts for Mechanical Project Managers:** Project managers must have a rudimentary understanding of fundamental legal concepts to effectively and profitably manage their projects and their customers. With this information, they are more likely to be proactive in avoiding potential legal problems on their projects and more confident and effective in successfully documenting, debating, negotiating, and resolving difficult project issues and disagreements while maintaining positive customer relationships.
- **High Impact Communication Skills:** Due to the complexity of the construction process and the numerous people involved in a project's completion, excellent communication skills are required to succeed at project management. When communication problems develop, relationships usually weaken, misunderstandings occur, and project failure is imminent. Excellent communication skills are essential to creating a successful project and a successful career.
- **Best Practices of Blue Chip Mechanical Project Managers:** Why are some project managers consistently more successful than the "typical" project manager in our industry? What separates good project managers from great project managers? While age, experience, attitude, and talent are important factors in a project manager's success, the instructor has identified and will share the best practices skills that can be learned by any project manager who has the attitude, aptitude, and desire to improve and succeed.
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SALES/SERVICE/SAFETY

Sexual Harassment Prevention Training

Jennifer Raphael Komsky, Esq. – **NEW SPEAKER!**

Thursday, April 6, 2017

7:30 a.m. – 9:30 a.m.

Members: Free

Non-Members: \$125

If your business has 50 or more employees, state law requires you to provide sexual harassment prevention training to all Supervisors in 2015 who were previously trained by the December 31, 2013 deadline and Supervisors hired or promoted to their position in the past six months. If you have less than 50 employees, this training can increase your protection against claims.

Although not required, you should consider this class because:

- Your business may fall under new proposed regulations, which, if passed, may expand the definition of “supervisor” and “employ 50 or more.”
- Your past training may not stand the test of these proposed regulations. The proposed regulations require a “subject matter expert” and that the training be “interactive.” You can make sure you’re on solid ground with training by an experienced employment law attorney.
- Your attention to pro-active training can only provide for a more comfortable work environment and fewer claims for the company.
- You increase the potential for protecting yourself against claims, which average \$250,000

CLICKSAFETY ONLINE COURSES

ClickSafety – Online Safety Courses

Anytime – Accessible 24/7
online from your computer

Member: Free (however CPMCA will bill for the cost of the class if the class is not completed)

Non-Member: Not Available



As the leader in online safety training solutions, ClickSafety offers a comprehensive library of over 300 courses, specifically engineered to help you build a world-class safety culture. Developed by Certified Safety Professionals and Certified Industrial Hygienists, our courses are designed to protect your most valuable asset – your employees. A complete list of topics is available on CPMCA’s website.

Please note: all classes must be completed within 6 months from the start date. Classes are offered free of charge to members, however CPMCA will bill for the cost of the class if the class is not completed by due date.

OSHA Online 10-Hour Safety & Health

OSHA Online 30-Hour Construction

**OSHA Updates Confined Spaces in
Construction Standard**

**Cal/OSHA Heat Illness Prevention
for Workers**

Asbestos

100% Fall Protection

WEBCASTS ARE AVAILABLE AT WWW.CPMCA.ORG!

NOTE: All Webcasts are Online Courses that can be accessed on CPMCA's website at any time. They are available to CPMCA members only. Your company login information is required to access these courses.

Active Listening

Mark Matteson

Online Course – Please contact our office to obtain or create login credentials.

Active Listening is vital in today's business environment. In this webcast, you will learn from Mark Matteson the 4 steps to Active Listening and how to apply them in everyday business communication with your customers. According to Mark Matteson, the 4 steps to active listening are: listen active and with intention, pause 3 – 5 seconds before responding, question for clarification and paraphrase. Incorporating these 4 basic steps into your customer relations will improve your effectiveness and increase your sales with your customers

BIM 101

Dwayne Lindsey

Online Course – Please contact our office to obtain or create login credentials.

There is simply no easier way to learn about BIM (Building Information Modeling) than viewing this easy to understand webcast. You will learn exactly what BIM is and why it's good for your industry in a non-technical way.

Excel: Insert Excel Sheet into Word

Ginnie Floraday

Online Course – Please contact our office to obtain or create login credentials.

You can incorporate an Excel workbook into your Word document. You have the choice of linking to the actual Excel sheet or bringing in a static copy of the worksheet. If you link to the original file it is called embedding. If changes are made to the original selection they will appear in the copied text within Word. A static copy will not transfer any of the changes back to the spreadsheet.

Excel: Solver Procedure

Ginnie Floraday

Online Course – Please contact our office to obtain or create login credentials.

This webcast will show you how to use the Solver function in Excel to streamline formulas in spreadsheets. Solver allows you to calculate a formula backwards. Participants will learn how to change the value of a cell that is dependent on a formula. An example of the application of this function is budgets. After setting individual projections within each department, a department total is generated for each department. If you know that a certain department cannot exceed a certain amount, the Solver can modify the individual numbers that impact the total. All you have to do is identify what the total should be, and Solver will modify any of the related cells.

Excel: Summarizing Data with Subtotals in Excel

Ginnie Floraday

Online Course – Please contact our office to obtain or create login credentials.

When the data is in list form, Microsoft Excel can calculate and insert subtotals in a worksheet. When you specify the items you want to create subtotals for, the values to be summarized, and the functions to use on the values, Microsoft Excel outlines the worksheet so that you can show or hide as much detail as you need. If you have summarized data by using formulas that contain functions such as SUM, Microsoft can automatically outline the data.

Going Green – Valuable Opportunities for Mechanical Contractors

Jeff Grossberg

Online Course – Please contact our office to obtain or create login credentials.

Jeff Grossberg will inform member contractors about the growing demand of sustainable technology. Grossberg encourages contractors to become leaders, rather than followers, and offers guidance on how contractors can grow their business and garner market share by entering the green building marketplace.

Green Building: LEED Certification and Sustainable Design

Lincoln Pearce

Online Course – Please contact our office to obtain or create login credentials.

Once considered a passing fad, green building has driven its roots deep into the American landscape. City Halls in Chicago and Atlanta have green rooftops and green building initiatives are thriving in Los Angeles, Seattle, Denver, Dallas and other major cities nationwide. Even the United Nations headquarters in New York will be renovated with green principles in mind.

Green Building: LEED Certification “So You Want to be a Green Contractor”

Dan Bulley

Online Course – Please contact our office to obtain or create login credentials.

Learn what it takes to become a green contractor with Dan Bulley.

Mechanical Estimating Techniques

Keith Rahn

Online Course – Please contact our office to obtain or create login credentials.

If you can expertly estimate the cost of a construction project you have the edge in the bidding process. Keith Rahn will teach you how to analyze contract documents and estimate more accurately than your competition. Keith's techniques will give you the tools you need to win the bid and establish long-term trusted relationships with your customers.

Microsoft Office 2007 Excel

Ginnie Floraday

Online Course – Please contact our office to obtain or create login credentials.

This webcast will give an overview to the updated version of Excel including improvements to Pivot tables, Filters and advanced formatting.

Microsoft Office 2007 Overview

Ginnie Floraday

Online Course – Please contact our office to obtain or create login credentials.

This webcast will give an overview to the updated versions of Excel, Word, PowerPoint and Outlook. Some of the new features to be reviewed will be the Ribbon (the replacement for the toolbar), the Mini Toolbar, document Themes and Quick Styles in Word. Excel enhancements include improvements to Pivot tables, Filters and advanced formatting.

Microsoft Word Fill-In Forms – Build a Word document with Fields

Ginnie Floraday

Online Course – Please contact our office to obtain or create login credentials.

A form is a structured document with spaces reserved for entering information. You design the form, and others can fill it in on paper or in Microsoft Word.

PowerPoint: Introduction to PowerPoint 2007

Ginnie Floraday

Online Course – Please contact our office to obtain or create login credentials.

This webcast will provide an overview to the updated version of PowerPoint.

Retro-Commissioning

Chris Philbrick

Online Course – Please contact our office to obtain or create login credentials.

Retro-Commissioning is a commissioning process applied to existing buildings that have never been commissioned. It is a systematic, documented process that identifies low-cost operations and maintenance improvements in existing buildings and brings the building up to the design intentions of its current usage. Retro-commissioning assures that the mechanical systems are optimally integrated and perform together as efficiently as possible. Retro-commissioning's primary focus is on using O&M tune-up activities and diagnostic testing to optimize the building systems. This course will outline the process and phases of RCx: planning, investigation, implementations, measurement and verification. Chris Philbrick will cover a typical project that has moved through the retro-commissioning process and will include a summary of cost and savings for multiple projects. Typical low cost measure will be discussed as well as how the retro-commissioning process relates to LEED EB credits.

Water Efficiency and How It Relates to Green Building

Jim Allen

Online Course – Please contact our office to obtain or create login credentials.

Seventy percent of the Earth's surface is water...and yet only 3 percent is fresh water, and 57 percent of that fresh water is frozen in polar ice caps and glaciers. Only 1 percent of the Earth's water is available for human consumption – and the green building movement is working to conserve that vital, limited supply. This online course will inform member contractors about the importance of water conservation, as well as ways to improve water efficiency in a building project. The online course covers how different industries use water and provides an overview of national conservation initiatives. Upcoming technologies and emerging trends to conserve water are also discussed.

Workplace Violence

Rick Maltz

Online Course – Please contact our office to obtain or create login credentials.

Workplace violence is a leading liability to employers, but can be prevented with proper on-the-job measures. This webcast helps employers understand the impact of workplace violence, explains what Red Flag indicators to look for, and review best practices for developing a Workplace Violence Prevention program.



NOTES



CPMCA

California Plumbing & Mechanical

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