



CPMCA

California Plumbing & Mechanical
Contractors Association

Seminar Catalog

**January–June
2018**

**Computer Skills/Technology • Management • Project Management
Foreman Training Program • People Management/Skills
• Sales/Service/Safety • Certified Safety – Safety Risk Control • Webcasts**

Contents

CPMCA Executive Committee, Board of Directors and Staff	2
Education Committee	2
Letter from the Executive Director	3
Schedule at a Glance by Month.	4
Schedule at a Glance by Track	5
Important Events	6
2018 Instructors	7
Computer Skills/Technology	11
Management	13
Project Management.	14
Project Management / Foreman Training Program	16
Foreman Training	19
People Management/Skills	19
Sales/Service/Safety	20
Certified Safety – Safety Risk Control.	20
Webcasts – Available on CPMCA’S Website	22

CPMCA Executive Committee, Board of Directors and Staff

Executive Committee 2018–2019

David Quirk, President

Performance Mechanical, Inc.

Jim DeFlavio, Vice President

Murray Co.

Jay Lusita, Secretary

Tier One Plumbing

Steve Cornelius, Treasurer

University Mechanical & Engineering
Contractors – San Diego

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

Dan Naylor

Kinetics

Randy Stewart

Pan-Pacific Mechanical

Education Committee

Harry Bederian – Chairperson

ARB, Inc.

Shaabini Alford

Murray Co.

Scott Baker

Southland Industries

Travis Craven

All Area Plumbing, Inc.

Steve Klaus

Schultz Mechanical

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

Johanna Bracy

Vice President of Member Services

Letter from the Executive Director



We are delighted to present you with CPMCA's 11th semi-annual Seminar Catalog featuring classes January – June 2018. With the new year comes a fresh start and innovation! First and foremost, we are excited to bring you CPMCA's first Technology Day on April 5, 2018 – mark your calendars and come learn about important technology trends in our industry and how these trends will directly impact your work! As for our seminar catalog, in addition to some favorites, we are offering a few new courses that we hope you find incredibly informative and helpful for your personal and professional growth. Among them, you will find an introductory course for Project Engineers as well as a course on the widely acclaimed concept of values-based leadership. We also restructured the popular John Koontz Project Manager/Foreman Training Series to offer you a course that we hope is a more efficient and effective use of your time. For Bluebeam users, the release of Revu 2018 is upon us (March 2018) so we plan to offer both a Revu 2017 class (in January 2018) and a Revu 2018 class (in the Fall 2018) to cater to all user preferences.

Our courses are collectively meant to keep member contractors and their staff ahead of the curve with skills needed to thrive in the plumbing/mechanical industry. We continue to participate in the state-funded grant under the ETP, Employment Training Panel; thank you to our members for your support! The ETP 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. We encourage you to browse through this brochure and attend as many 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; the overall betterment of our contractors and their workers in Southern California.

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.

For questions, please contact Michelle Lynn at Michelle@cpmca.org or 818-275-2893

SCHEDULE AT A GLANCE BY MONTH

The following is a list of classes offered during the first half of 2018.

January

11	Microsoft Project 2016 – Part 1
18	Mastering the 8 Tenets of Values-Based Leadership
24	Microsoft Project 2016 – Part 2
31	Bluebeam Revu 2017

February

15	Dealing with Difficult People in Construction
16-17	Project Manager/Foreman Training Series 1 & 2
21	Microsoft Excel 2016 – Part 1

March

1	Microsoft Excel 2016 – Part 2
14	Microsoft Excel 2016 – Part 3
16-17	Project Manager/Foreman Training Series 3 & 4

April

20-21	Project Manager/Foreman Training Series 5 & 6
26	Project Managers Impact on Financial Outcomes

May

2	Sexual Harassment Prevention Training
18	California Construction Law Essentials

June

6	Six Habits of the Highly Effective Foreman
22	Maximize Productivity Utilizing a Best-In-Class Prefab System
29	Project Engineering Basics in 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
- Workplace Violence

Computer Skills & Technology

- Microsoft Project 2016 - Part 1
Thursday, January 11, 2018
- Microsoft Project 2016 – Part 2
Wednesday, January 24, 2018
- Bluebeam Revu 2017
Wednesday, January 31, 2018
- Microsoft Excel 2016 – Part 1
Wednesday, February 21, 2018
- Microsoft Excel 2016 – Part 2
Thursday, March 1, 2018
- Microsoft Excel 2016 – Part 3
Wednesday, March 14, 2018

Foreman

- Six Habits of the Highly Effective Foreman
Wednesday, June 6, 2018

Management

- California Construction Law Essentials
Friday, May 18, 2018

Project Management

- Project Managers Impact on Financial Outcomes
Thursday, April 26, 2018
- Maximizing Productivity Utilizing a Best-In-Class Prefab System
Friday, June 22, 2018
- Project Engineering Basics in Construction
Friday, June 29, 2018

Project Manager/Foreman Training Series

- Project Manager/Foreman Training Series 1 & 2
Fri & Sat, February 16-17, 2018
- Project Manager/Foreman Training Series 3 & 4
Fri & Sat, March 16-17, 2018
- Project Manager/Foreman Training Series 5 & 6
Fri & Sat, April 20-21, 2018

People Management/Skills

- Mastering the 8 Tenets of Values-Based Leadership
Thursday, January 18, 2018
- Dealing with Difficult People in Construction
Thursday, February 15, 2018

Sales/Service/Safety

- Sexual Harassment Prevention Training
Wednesday, May 2, 2018

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
- Workplace Violence

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

IMPORTANT EVENTS



Plan Accordingly! Take note of these important MCAA Events:

IPM Class 67, Week 2 – University of Texas, Austin, TX	January 14-18, 2018
IPM Class 68, Week 2 – University of Texas, Austin, TX	January 15-19, 2018
Advanced IPM - Class 14 - University of Texas, Austin, TX	January 21-26, 2018
Safety Directors' Conference – San Diego, CA	January 23-25, 2018
MSCA Sales Leadership Symposium – Irvine, CA	January 29-30, 2018
MSCA Sales Basecamp – Phoenix, AZ	February 5-6, 2018
MSCA Service Managers Training program – Baltimore, MD	March 19-22, 2018
MCAA Annual Convention – San Antonio, TX	March 25-29, 2018
2018 MSCA Sales Masters Week 1 – Oak Brook, IL	April 15-19, 2018
NCPWB Spring Technical Committee Meeting – Rancho Mirage, CA	April 22-25, 2018
IPM Class 69, Week 1 - University of Texas, Austin, TX	April 22-26, 2018
IPM Class 70, Week 1 - University of Texas, Austin, TX	April 23-27, 2018
MSCA Sales Basecamp – Chicago, IL	May 7-8, 2018
National Issues Conference – Washington, DC	May 8-10, 2018
Fabrication Conference - Buffalo, NY	May 9-11, 2018
Field Leaders Conference – Indianapolis, IN	May 16-18, 2018

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 Institute for Project Management, contact Harlee Gallo @ hgallo@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 Technology Day – Marriott Marina Del Rey, Marina Del Rey, CA	Thursday, April 5, 2018
CPMCA Annual Golf Tournament – Friendly Hills Country Club, Whittier, CA	Monday, May 14, 2018

CPMCA Contacts:

For educational classes and CPMCA Technology Day, contact Michelle Lynn @ michelle@cpmca.org or 818-275-2893.

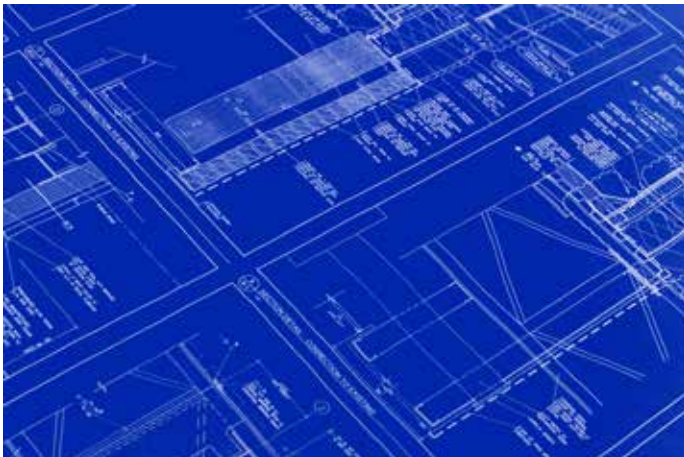
For meetings, retreats, and all other events, contact Dana Giambalvo @ dana@cpmca.org or 818-275-2890



David Ashcraft's expertise is taking normally tortuous subject matter and making it educational, engaging, and entertaining. He learned early in his career that a bad presentation matched with a bad PowerPoint can persecute an audience and kill a presenter's message. Mr. Ashcraft has been engaging businesses as a professional speaker for over twenty years. Over the last ten years, David has been working with contracting associations and companies to teach their people the impact they have on financial outcomes. Mr. Ashcraft specializes in presentation coaching and financial education. He works closely with clients to design and develop training specific to their everyday business needs. Mr. Ashcraft received his BA from Washington State University and is a graduate of Pacific Coast Banking School, where he later served as an associate director. His clients include: Microsoft, Chase Bank, CBRE, Cushman and Wakefield, McKinstry, Turner, Wells Fargo, Plum Creek, Pacific Project Management, PitchBook, MCA of Western Washington, MCA Chicago, MCA Kansas City, New England MCA, Building Trades Employers Association, Puget Sound Bank, Cal Portland, Swift Marketing Group, Vistage, TEC Canada, Integrated Projects Group, Modern Construction Services, and Tiger Oak Publications.



Harry Bederian became interested in the mechanical contracting industry when he was an undergraduate student at Cal Poly Pomona and served as the president of the MCAA/CPMCA Student Chapter. He majored in Engineering Technology with an emphasis in Mechanical and Manufacturing Engineering and a minor in Business. Harry began his career in the HVAC sector then 2 years later, transitioned to the industrial sector. He has been a Project Engineer at ARB, Inc. for the past 6 years and worked in a leadership role on projects that include, but are not limited to: the NRG Re-Power Project, the Mojave Solar Project, CRC Gas Compressor Station, and the Valero Refinery Power Plant. His involvement in the industry is diverse, having also served as the CPMCA Education and Scholarship Committee Chair for the past 6 years, a mentor to the Cal Poly Pomona MCAA/CPMCA Student Chapter for the past 7 years and on the Engineering Senior Project Panel at his alma mater, Cal Poly Pomona. Harry recognizes that constantly improving and adding to his skillset is vital to being successful in this industry and thus, will obtain his project management certificate through UCLA in June 2018.





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.



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.



Lilian Magallanes has eight years of facilities experience and five years of construction management experience in both private and public projects. In her previous role as a BIM Coordinator for the Los Angeles Community College District, her team identified technologies and applications of BIM and challenged the industry to deliver buildings through the use of modeling standards, collaboration, and quality assurance.

Currently in her role as Industry Specialist, she works alongside the Account Services team in providing industry knowledge and workflow solutions to the AEC community.



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.



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.



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.



Thomas (Tom) L. Williams, P.E. was MCAA President in 2003. He recently retired from McKenney's, Inc., a multi-disciplined construction and engineering firm based in Atlanta, and serving the Southeast. During Tom's thirty-one years with the company, McKenney's annual revenues grew from \$3 million dollars to \$145 million dollars. A significant portion of the work is design / build. Mr. Williams has been personally involved with the construction of hospitals, office buildings, museums, stadiums, public buildings, and industrial projects. Tom Williams is a graduate of the Georgia Institute of Technology where he received a degree in mechanical engineering. He has been educating through the Mechanical Contractors of America National Education Initiative teaching industry professionals how to improve both their hard and soft skills. Mr. Williams presents regularly at local associations in the United States and Canada. He also teaches at MCAA's Institute for Project Management and the Advanced Institute for Project Management. His seminars make extensive use of case studies and real project examples. Tom is also a consultant to local associations and contractors on labor negotiations and best business practices.



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.



Microsoft Project 2016 – Part 1

New Horizons Computer Learning Center – Anaheim

Thursday, January 11, 2018

8:00 a.m. – 4:00 p.m.

Member: Free

Non-Member: \$299

This course is designed for a person with an understanding of project management concepts and who is responsible for creating and maintaining project plans. The course will familiarize students with the basic features and functions of Microsoft Project Professional 2016 so they can use it effectively and efficiently in a real-world environment. In this course, you will learn to create and engage in basic management of a project, which includes the following: creating and defining a new project plan, creating and organizing tasks, managing resources in a project plan, and finalizing a project plan.

Microsoft Project 2016 – Part 2

New Horizons Computer Learning Center – Anaheim

Wednesday, January 24, 2018

8:00 a.m. – 4:00 p.m.

Member: Free

Non-Member: \$299

This course covers the skills a project manager needs to update and project plan during the execution, monitoring, and controlling phases of a project. This course will enable students to manage the project so that it is completed on time and within budget. Upon completion of this course, you will be able to update a project plan to reflect progress as you execute the project, monitor project progress in the project plan, adjust the project plan to control constraints, create project reports to share a project's status, and customize project settings and share customizations with other projects.

Bluebeam Training – Revu 2017

Joe Sullivan & Lilian Magallanes

Wednesday, January 31, 2018

7:30 a.m. – 3:30 p.m.

Member: Free

Non-Member: \$299



“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 class will consist of 2 tracks:

Bluebeam Technology – Revu Basics | Takeoffs & Estimation – BEGINNER

Spend the first half of the day learning about the Revu Basics: Interface, Navigation, Profiles, Document Editing, Markup Tools, Tool Chest and the Markups List. Spend the afternoon learning to make the most of Revu's Takeoff & Estimation features!

Bluebeam Technology – Document Control I Takeoffs & Estimation – ADVANCED

This session is for those who are familiar with skills covered in Basics. Build upon your skills and learn about some more advanced workflows like Takeoffs & Estimation and managing changing and revisions with our Document Control features.

*The next version of Bluebeam Revu, Revu 2018, is scheduled for release in Spring 2018 featuring major enhancements and changes to its interface. Stay tuned, as CPMCA plans to offer a training class on this new version in Fall 2018!

Microsoft Excel 2016 – Part 1 (of 3)

New Horizons Computer Learning Center – Anaheim

Wednesday, February 21, 2018

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

Thursday, March 1, 2018

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.

Microsoft Excel 2016 – Part 3 (of 3)

New Horizons Computer Learning Center – Anaheim

Wednesday, March 14, 2018

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.

MANAGEMENT

California Construction Law Basics & Construction Contracts

Theresa Tate

Friday, May 18, 2018

7:30 a.m. – 11:30 a.m.

Member: Free

Non-Member: \$179



An overview from contracts to collections. Understanding the basics of California construction laws is essential to every construction company. These laws impact the initial bid, the formulation of a fair contract, processing of change order requests and finally the collection efforts that may be necessary to obtain payment. This workshop will cover a legal overview of the laws affecting both public and private projects. Construction company team members attending will leave with a better understanding of today's legal environment and how to best manage each phase of a project including:

1. Conditioning your bid for success
2. Essential tools for negotiating profitable contracts
3. Avoiding “killer” contract clauses
4. Awareness of licensing and insurance hurdles
5. Proper management of change orders and claims
6. Securing payment through statutory collection tools

PROJECT MANAGEMENT

Project Engineering Basics in Construction

Harry Bederian

Friday, April 20, 2017

7:30 a.m. – 2:30 p.m.

Member: Free

Non-Member: \$179



This seminar provides a practical overview of project engineering in construction. It is designed for individuals who have recently become a Project Engineer, are on the path to becoming a Project Engineer, have just transferred to this position, or are simply interested in what this role entails. A project engineer's task is to bridge the gap between engineering and management/construction. This course will cover the basics of how to fill and navigate this gap. Topics covered include: 1) The role/duty of a project engineer, 2) Request for Information, 3) Submittals, 4) Quality/Specifications, 5) Meetings/Meeting Minutes, 6) Scheduling, 7) Types of training/certificates, and 8) Do and Don'ts.

Project Managers Impact on Financial Outcomes

David Ashcraft

Thursday, April 26, 2018

7:30 a.m. – 2:30 p.m.

Member: Free

Non-Member: \$179

A financial management class that your staff will enjoy! Project managers will have FUN as they work through a case study and uncover the math mystery buried in the WIP. They will calculate each column by hand to see where the numbers come from and recognize which numbers provide key information. They key information will spotlight problems and opportunities contained within the numbers of a financial report. Project managers will increase their financial fluency and be able to communicate more effectively to get the right information to make their projects more profitable. Topics include:

- How project managers impact the company income statement and balance sheet
- How the WIP can effect year end profits and cash flow
- Overbillings and underbillings and the impact of each
- Analyze the difference between gross profit % and mark up %
- WIP Case Study explaining what each column represents and where the math comes from
- Explain what percentage of completion accounting is and why it is used

Maximizing Productivity Utilizing a Best-In-Class Prefab System

Stephane McShane

Friday, June 22, 2018

7:30 a.m. – 2:30 p.m.

Member: Free

Non-Member: \$179

Best-In-class contractors are bringing 50-60% of field labor into the prefabrication. To stay competitive in today's market, contractors must stop thinking about prefabrication as a custom, once in a lifetime job and start thinking about it like a manufacturer where standard products are built for installation. We will discuss Lean best practices being deployed in the construction industry, the importance of design standardization, linking estimating to detailing to prefabrication to field installation, and logistics and inventory management ideas to further enhance cost reductions resulting in higher margins.

Learning objectives:

- Apply best practices used in the industry to accelerate the adoption and implementation of prefab at your organization.
- Utilize prefabrication/LEAN principles to eliminate waste and create value.
- Create a continuous flow of people, process and materials with Value Stream Mapping. Improve field productivity with design standardization.



PROJECT MANAGEMENT/FOREMAN TRAINING PROGRAM

CONTINUED

This year, we are excited to offer you a new iteration of John Koontz' Project Management and Foreman Training classes! In an effort to encourage the strongest synergy between the Project Manager and Foreman, we have restructured the course content combining the most relevant topics to the entire project team (Project Manager and Foreman). Topics are hand-picked from John Koontz' past Project Management and Foreman training classes and streamlined to create a curriculum that will benefit both Project Manager and Foreman individually and collectively as a team. This course is intended for both Project Managers and Foremen to attend and will consist of FIVE 2-day classes (scheduled throughout the year), allowing members to complete the entire program in a year.

Project Manager and Foreman Training Program 1 & 2

John R. Koontz

Fri & Sat, February 16 & 17, 2018

Day 1: 7:30 a.m. – 4:30 p.m.

Day 2: 7:00 a.m. – 11:00 a.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following:

- **Planning Skills for the Project Team** – All great project managers and project foremen are master planners; there is no such thing as a great project manager or foreman who is a “decent” planner. All wildly successful projects are incredibly well planned by all members of the project team; project manager, foreman, fabrication manager, coordination manager, safety manager, warehouse manager, purchasing manager, etc. The project manager is the “president of the project” and is ultimately responsible for all project planning and the quality of that planning. This session will focus on both the project manager and foreman's role and responsibilities in project planning and the three stages of planning; 1) Information Turnover, 2) Preconstruction Planning, and 3) Short Interval Planning. This session will also focus on direct relationship between planning, productivity, and profitability.
- **Productivity Improvement for Mechanical Projects** – Great project management, by both the foreman and project manager, is primarily responsible for creating excellent productivity on every project. Due to the endless number of variables, which negatively effect worker efficiency, excellent productivity is the project team's greatest challenge. Productivity also has the greatest positive or negative impact on project and company profitability. Excellent productivity requires proactive, diligent, and detailed planning by the project manager and foreman at each step of the project. In this session, the instructor will provide proven methods and practices for creating, controlling, and improving project productivity on all types of projects.

Project Manager and Foreman Training Program 3 & 4

John R. Koontz

Fri & Sat, March 16 & 17, 2018

Day 1: 7:30 a.m. – 4:30 p.m.

Day 2: 7:00 a.m. – 11:00 a.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following:

- **Fundamentals of Job Cost Control (Managing Project Labor Cost)** – In this session the instructor will help attendees to gain an understanding of the job cost control and labor cost trending methods as detailed in the Job Cost Control section of the MCAA Project Manager’s Manual. All project managers and foremen must learn to use their job cost control system as a primary management tool to control and cause a positive project outcome rather than simply focusing on cost documentation and cost history. Great project managers and great foremen CONTROL their project cost while their average peers only tend to WATCH project cost. This “basic” session is geared to new or potential project managers and foremen with little or no experience in job cost control systems and procedures and as a great refresher to more experienced project managers.
- **Project Billings and Maintaining Positive Cash Flow** – Maintaining positive cash flow is one of the mechanical contractor’s greatest challenges. The construction industry’s standard billing and payment model is a formula that has the potential to create poor cash flow on almost every project. This session focuses on how the project manager and project foreman, with a great partnership of planning, creativity, excellent project execution, and positive customer relationships can regularly create positive project cash flow on most projects.
- **Essential Management Skills** – Learn the unique, basic management skills of the mechanical project manager and the project foreman. The primary focus of this session is “People Management”. Gain an understanding of the essential traits, skills, and behaviors that allow effective management.

Project Manager and Foreman Training Program 3 & 4

John R. Koontz

Fri & Sat, April 20 & 21, 2018

Day 1: 7:30 a.m. – 4:30 p.m.

Day 2: 7:00 a.m. – 11:00 a.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

- **Contracts: Using the Contract as a Tool for Project Management** – Gain a basic understanding of contract types and components, and learn how to use the contract to maximize profitability while managing a mechanical construction project. Learn skills to help you know what the contract says and how to organize and manage the project accordingly.
- **Effective Project Documentation** – Documentation is a very time consuming but necessary evil in the construction process. Due to the great risk accepted when a Mechanical Contractor signs a contract, all mechanical projects must have a contemporaneously written factual record/history of all significant events, written by the people closest to the work. The key with documentation is having the right amount and the right types of documentation based upon the specific characteristics of the customer and the project. Over documenting a project wastes valuable company resources and can distract the project team from solving difficult project problems. Under documenting a project gives the project team a false sense of security and puts the company in an unnecessary position of risk if something goes terribly wrong on the project. Great project managers and foremen understand that excellent project documentation can prevent or protect your company from problem “escalation.” In this session, the instructor will review all the basic project documentation types and discuss the steps necessary to plan and implement the project documentation process. The instructor will provide attendees with proven methods for successfully documenting all types of mechanical projects.
- **Change Order Management: Best Practices for Success** - Successfully managing change orders on a complex and constantly changing project is often the project team’s greatest challenge. If not well managed by a proactive and knowledgeable project manager and foreman who are acting as great partners, change orders can cause unnecessary additional risk, destroy base contract labor productivity, ruin customer and contractor relationships, choke cash flow, reduce or eliminate profitability, and create nearly irreversible negative jobsite moral. In this session, John Koontz will provide all attendees, regardless of age or experience level, with numerous strategies and proven best practices for successfully navigating this multi-faceted and complicated project management challenge.

Six Habits of the Highly Effective Foreman

Tom Williams

Wednesday, June 6, 2018

7:30 a.m. – 3:30 p.m.

Member: Free

Non-Member: \$179

The course is taught using the Covey Seven Habits model: Be proactive; Begin with the end in mind; Put first things first; Think win/win; Seek first to understand, then to be understood; Synergize; and Sharpen the saw. Each foreman is introduced to the actions he can take to influence the changes that must be made in our industry if we are to survive and then thrive. Each individual's sphere of influence is discussed and how each foreman can personally influence the local union, those that work for him, and himself to ensure that dramatic improvements are made.

PEOPLE MANAGEMENT/SKILLS

Mastering the 8 Tenets of Values-Based Leadership

John Zulli, PhD

Thursday, January 18, 2018

7:30 a.m. – 2:30 p.m.

Member: Free

Non-Member: \$179

Harry M. Jansen Kraemer Jr., former CEO of Baxter International and professor of the year in 2008 at Northwestern University's Kellogg School of Business, believes that "the only true leadership is values-based leadership" and that becoming the best leader involves rooting yourself in who you are and what matters most to you. There are a handful of keys that will help you achieve lasting career success through values-based leadership. In this course, you will learn what the 8 tenets of values-based leadership are and why they matter, how to identify driving values at an individual, team, and organizational level, how to improve collaboration and results by infusing core values into every aspect of the workplace climate and how to handle ethical dilemmas.

Dealing with Difficult People in Construction

Kevin L. Dougherty

Thursday, February 15, 2018

7:30 a.m. – 2:30 p.m.

Member: Free

Non-Member: \$179

This program will help you get even the most difficult person eating out of your hands. You will walk away from this program with some tricks and tactics which you will put to immediate use, and learn how to keep the tempers from flaring.

SALES/SERVICE/SAFETY

Sexual Harassment Prevention Training

Roxana Verano, Esq.

Wednesday, May 2, 2018

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.

CERTIFIED SAFETY – SAFETY RISK CONTROL

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.



OSHA Online 10-Hour Safety & Health

Anytime Online

OSHA 10-Hour Construction is a part of an online OSHA outreach program that results in a valid DOL/OSHA 10-Hour Card. This OSHA10 online training course teaches recognition, avoidance, abatement and prevention of safety and health hazards in workplaces. This course also provides information regarding workers' rights, employer responsibilities and how to file a complaint. It was also designed to help individuals stay up-to-date with their OSHA safety requirements.

OSHA Online 30-Hour Construction

Anytime Online

OSHA 30-Hour Construction is an OSHA-Authorized online course featuring the required steps for completing OSHA Outreach training and receiving an OSHA 30 Card. This online training covers everything from Electrical Hazard Safety to Fall Protection. ClickSafety's OSHA 30-Hour Construction course is a proven way to receive a valid OSHA 30-Hour Card and achieve the safety level required by your company for work in the construction industry.

OSHA Updates Confined Spaces in Construction Standard

Anytime Online

OSHA's final rule for Confined Spaces in Construction went into effect August 3, 2015. Are you and your coworkers prepared for the changes? This week, Pete Rice, CSP, CIH discusses OSHA's Final Rule for Confined Spaces in Construction, including how it differs from the Confined Spaces in General Industry standard. Pete shares the Top 5 Changes to the CS in Construction rule and why the new rule was enacted.

ClickSafety has 2 new Confined Spaces in Construction online safety training courses that meet OSHA's final rule for Confined Spaces in Construction:

Confined Spaces in Construction Awareness (20-minute)

Confined Spaces in Construction; An Instruction (75-Minute)

Cal/OSHA Heat Illness Prevention for Workers

Cal/OSHA Heat Illness Prevention is intended for employers in all industries that have employees working in California with the potential for exposure to heat illness and heat stress. This course is intended to familiarize the student with the basics of Cal/OSHA's standard, titled *Heat Illness Prevention*, and found in Section 3395 of the Title 8 California Code of Regulations, effective on May 1, 2015.

CERTIFIED SAFETY – SAFETY RISK CONTROL

CONTINUED

Asbestos

Asbestos exposure happens when workers disturb asbestos-containing materials during demolition and renovation of buildings. In this introductory course, we will teach you about the properties and exposures of asbestos as covered by OSHA Standard Subpart Z 29 CFR 1910.1001 for General Industry. This course also covers how to protect workers from exposure of asbestos in the workplace.

100% Fall Protection

This course is intended to inform students of basic guidelines and methods employed for a 100% fall protection program. It reviews elements of fall hazards, fall hazard evaluation, and fall hazard control. This training references applicable OSHA requirements and other pertinent information. Real life case studies and lessons learned are presented to illustrate the “why” and the “need” for compliance and following OSHA requirements and industrial best practices.

To sign-up for online training through our partners at ClickSafety.com, please contact CPMCA or the A & J for more information. CPMCA process enrollment for contractor members staff personnel while the Apprentice & Journeymen Training Trust Fund processes class assignments for Union members.

WEBCASTS – AVAILABLE ON CPMCA'S WEBSITE

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.



CPMCA

California Plumbing & Mechanical

**California Plumbing & Mechanical
Contractors Association
3500 W. Olive Avenue, Suite 860
Burbank, CA 91505**

RETURN SERVICE REQUESTED

PRSR1 STD
U.S. POSTAGE
PAID
Pasadena, CA
PERMIT # 740