



**CPMCA**

California Plumbing & Mechanical  
Contractors Association

# **Seminar Catalog**

**January–June  
2019**

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



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# CPMCA Executive Committee, Board of Directors

## Executive Committee 2019–2020

**Jim DeFlavio, President**

Murray Company

**Jay Lusita, Vice President**

Tier One Plumbing

**Bryan Suttles, Secretary**

Suttles Plumbing & Mechanical Corporation

**Steve Cornelius, Treasurer**

University Mechanical & Engineering  
Contractors – San Diego

**Tim Healy, Past President**

ARB, Inc.

## Board of Directors

**Harry Bederian**

ARB, Inc.

**Matt Cunningham**

Jackson and Blanc

**John Feikema**

California Spectra Instrumentation, Inc.

**Mark Felio**

Paul Hansen Equipment, Inc.

**Pete Fortin**

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**Steve Fosdick**

Murray Company

**Mike Martin**

Couts Heating and Cooling, Inc.

**Dan Naylor**

Kinetics

**Randy Stewart**

Pan-Pacific Mechanical

**Larry Verne**

Verne's Plumbing, Inc.

## Education Committee

**Harry Bederian – Chairperson**

ARB, Inc.

**Shaabini Alford**

Murray Company

**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

**Johanna Bracy**

Vice President of Member Services

**Michelle Lynn**

Director of Education

**Dana Giambalvo**

Office Manager

## Letter from the Executive Director

CPMCA's 13th semi-annual Seminar Catalog (featuring classes January – June 2019) is here! This year, we are very excited to present new topics such as risk management in projects, supervising safety on a jobsite, and addressing the new role of estimators in our industry. Back by popular demand are your favorites: project engineering basics, Microsoft Project and Excel, and Bluebeam training. We hope you find this year's course selection valuable in your personal and professional growth. Some other exciting developments and reminders:



- **CPMCA Emerging Leaders:** We are proud to announce CPMCA Emerging Leaders, a new group for young professionals in the mechanical contracting industry. The group will host regular education and networking events to foster connection, communication and professional growth among rising stars in our community. We are also seeking participants in an Emerging Leaders Committee, which will help direct the group. If you are interested, please contact Johanna Bracy ([johanna@cpmca.org](mailto:johanna@cpmca.org)).
- **CPMCA Podcast:** With construction booming and tighter deadlines, we know you are busier than you've ever been. Coming in Spring 2019, the CPMCA podcast will offer you an opportunity to learn on the go, providing information and education about important and interesting topics in our industry. Stay tuned!
- **Journeyman Upgrade Training (JUT):** All classes listed in this course guide are approved and will count toward the JUT requirement. Make sure to take advantage of this opportunity! For more information about JUT, please visit [www.uniontopics.com/journeyman-training](http://www.uniontopics.com/journeyman-training).
- **2019 CPMCA Technology Day:** After a successful first year, we are excited to bring you the 2nd annual CPMCA Technology Day on April 25, 2019 at the Anaheim Marriott; we are hard at work, looking for the best presenters and vendors to help usher you into a new age of technology innovation in mechanical contracting.

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. We welcome you to attend as many seminars as fit your interest and career!

## 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 2019.

## January

|    |                                 |
|----|---------------------------------|
| 10 | Microsoft Project 2016 – Part 1 |
| 23 | Microsoft Project 2016 – Part 2 |

## February

|       |                                 |
|-------|---------------------------------|
| 14    | Microsoft Excel 2016 – Part 1   |
| 15-16 | Project Management 1 & 2        |
| 22    | Bluebeam Revu 2018 – ESSENTIALS |
| 27    | Microsoft Excel 2016 – Part 2   |

## March

|       |  |
|-------|--|
| 14    | Microsoft Excel 2016 – Part 3                  |
| 15-16 | Project Management 3 & 4                       |
| 21    | Time and Task Management<br>for Busy People    |
| 22    | Bluebeam Revu 2018 – ADVANCED                  |
| 28    | How to Nail Project<br>Interview Presentations |
| 29    | Risk Management                                |

## April

|       |                          |
|-------|--------------------------|
| 12-13 | Project Management 5 & 6 |
|-------|--------------------------|

## May

|    |  |
|----|--|
| 10 | Sexual Harassment<br>Prevention Training                               |
| 16 | Supervising for Safety   |
| 17 | Team and Trust Building 101  |
| 31 | Delivering the Ultimate Service<br>Experience: A Guide for Technicians |

## June

|    |   |
|----|---|
| 7  | The New Era of Estimating                     |
| 21 | Project Engineering Basics<br>in Construction |

## How to Register for CPMCA Classes

There are two ways to register:

- 1) Online invitations are emailed a month before each class date. The invitation will contain specific information about the class (time, location, parking directions, speaker information) as well as links to register online. If you are not on the email distribution list, please email [michelle@cpmca.org](mailto:michelle@cpmca.org).
- 2) Go to [www.cpmca.org](http://www.cpmca.org), hover over the “Education” tab, click on “Course Training Schedule.” You will see a list of classes for which registration is open. Click on “More Details” and then “Website” to view specific information about the class and/or to register online.

## Computer Skills & Technology

- Microsoft Project 2016 - Part 1  
Thursday, January 10, 2019
- Microsoft Project 2016 – Part 2  
Wednesday, January 23, 2019
- Microsoft Excel 2016 – Part 1  
Thursday, February 14, 2019
- Bluebeam Revu 2018 – ESSENTIALS  
Friday, February 22, 2019
- Microsoft Excel 2016 – Part 2  
Wednesday, February 27, 2019
- Microsoft Excel 2016 – Part 3  
Thursday, March 14, 2019
- Bluebeam Revu 2018 – ADVANCED  
Friday, March 22, 2019

## Estimating

- The New Era of Estimating  
Friday, June 7, 2019

## Management

- Time and Task Management for Busy People  
Thursday, March 21, 2019

## 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”

## Project Management

- Project Management 1 & 2  
Fri. & Sat., February 15-16, 2019
- Project Management 3 & 4  
Fri. & Sat., March 15-16, 2019
- How to Nail Project Interview Presentations  
Thursday, March 28, 2019
- Risk Management  
Friday, March 29, 2019
- Project Management 5 & 6  
Fri. & Sat., April 12-13, 2019
- Project Engineering Basics in Construction  
Friday, June 21, 2019

## People Management

- Team and Trust Building 101  
Friday, May 17, 2019

## Sales/Service/Safety

- Sexual Harassment Prevention Training  
Friday, May 10, 2019
- Supervising for Safety  
Thursday, May 16, 2019
- Delivering the Ultimate Service Experience:  
A Guide for Technicians  
Friday, May 31, 2019

- 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](http://www.cpmca.org) for complete listing*

# IMPORTANT EVENTS



Plan Accordingly! Take note of these important MCAA Events:

**IPM Class 71, Week 2 – University of Texas, Austin, TX**

January 13-17, 2019

**IPM Class 72, Week 2 – University of Texas, Austin, TX**

January 14-18, 2019

**Advanced IPM - Class 15 - University of Texas, Austin, TX**

January 20-25, 2019

**Safety Directors' Conference – Lake Buena Vista, FL**

January 22-24, 2019

**MCAA Technology Conference – Tampa, FL**

January 30-February 1, 2019

**MCAA Annual Convention – Phoenix, AZ**

March 3-7, 2019

**IPM Class 73, Week 1 – University of Texas, Austin, TX**

April 7-11, 2019

**IPM Class 74, Week 1 – University of Texas, Austin, TX**

April 8-12, 2019

**Fabrication Conference – Los Angeles, CA**

May 1-3, 2019

**National Issues Conference – Washington, DC**

May 7-9, 2019

**Field Leaders Conference – Denver, CO**

May 15-17, 2019

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](mailto:cbuffington@mcaa.org).

For Advanced Leadership Institute, contact Dennis Langley @ [dlangley@mcaa.org](mailto:dlangley@mcaa.org).

For Institute for Project Management, contact Harlee Gallo @ [hgallo@mcaa.org](mailto:hgallo@mcaa.org).

For online webcasts & conferences, contact Sean McGuire @ [smcguire@mcaa.org](mailto:smcguire@mcaa.org).

For online webcasts & MSCA, contact Barbara Dolim @ [bdolim@mcaa.org](mailto:bdolim@mcaa.org).



Plan Accordingly! Take note of these important CPMCA Events:

**CPMCA Technology Day – Anaheim Marriott, Anaheim, CA**

Thursday, April 25, 2019

**CPMCA Annual Golf Tournament – Oakmont Country Club, Glendale, CA**

Monday, May 13, 2019

CPMCA Contacts:

For educational classes and CPMCA Technology Day, contact Michelle Lynn @ [michelle@cpmca.org](mailto:michelle@cpmca.org) or 818-275-2893.

For meetings, retreats, and all other events, contact Dana Giambalvo @ [dana@cpmca.org](mailto:dana@cpmca.org) or 818-275-2890





**Troy Aichele** became involved with the mechanical contracting industry while obtaining his B.S. degree in Construction Management Degree at the University of Washington as an intern for a Seattle Mechanical Contractor. After graduating and working full-time, he went on to secure an A.A.S. degree in HVAC and Refrigeration Design and has since worked in every facet as a Mechanical Contractor in the Pacific Northwest over the last 25 years. Currently, Troy serves as Project Executive/Business Development at Holmberg Mechanical in Seattle and teaches mechanical construction courses nationally under his consulting company Aichele and Associates, LLC. Troy is a member of the MCAA's (Mechanical Contractors Association of America) Board of Directors, Past-Chairman of the MCAA Career Development Committee, which oversees 52 student chapters in North American and manages the popular Student Chapter Competition held yearly at MCAA's National Convention, and former member of the MCAA's Board of Trustees, MCERF (Mechanical Contracting Education & Research Foundation).



**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, obtained his project management certificate through UCLA in June 2018.



**Dan DeSalvo** is a trainer's trainer – a consummate professional who has delivered hundreds of seminars, keynote addresses, and training programs to clients ranging from small businesses to major corporations. His motivational, energetic style and thought-provoking programs are always met with great audience enthusiasm and acclaim. Dan's extensive professional career includes positions as an account executive for Dale Carnegie Training and as an executive vice president for Great American Seminars. Dan is also a professional mentor and trainer for Hofstra University's Business Development Center.

Dan specializes in helping professionals develop their communication skills; build more effective workplace relationships; and handle those inevitable personality clashes, job-related conflicts, and other difficult situations with ease. His programs are chock-full of fresh ideas, brilliant innovations, and keen insights into human behavior in today's workplace. Whether it's team building, dealing with difficult personalities, coaching and counseling, developing leadership skills, or creating crackerjack customer service teams, Dan helps people permanently transform the way they interact with others and perform their jobs.



**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 industry's top speaking and training talents.



**Gary Glader, CSP** is the President of Horton Safety Consultants and oversees a team of 15 safety professionals. The company provides a wide array of safety and industrial hygiene services to clients in a variety of industries including construction, transportation, and manufacturing. Services include program assessment, program development, OSHA compliance assistance, training, safety observations, and culture change. A lifetime endeavor, Gary always tries to make dry material educational and entertaining using his dry sense of humor and sarcasm. Gary and his team have built, and maintained, strong personal relationships with ownership, management, supervision, and front line

workers of the many clients the company services. Clients benefit from reductions in injuries, reduced costs, enhanced marketability, and improved morale. Gary is a member of the Chicagoland Associated General Contractors safety committee and works with other trade associations including the CPMCA, MCA of Chicago, Plumbing Contractors Association, and the National Demolition Association.



**Scott Koenig** has almost 20 years of training experience. He came to Bluebeam in August of 2015 after spending 18½ years training at ADP. As a Sr. Specialist in the Training and Development group, he currently works with AEC clients leading interactive classes on the basics of Revu as well as advanced workflow trainings. Scott also works as a trainer with our Bluebeam Certified Instructor (BCI) program where he leads classes that teach clients and resellers to train on Revu. He is married and has four kids ranging in age from 6 to 16. Scott's favorite part of being a trainer is that light-bulb moment that people get when they learn something new and it makes sense.



**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.



**Mark Matteson** started his career as an HVAC technician in 1976. He is one of those rare professionals who can say he is speaker, consultant, and author and mean it. He has attracted clients in HVAC contracting, distribution and manufacturing as well as such organizations like Microsoft, T-Mobile, John Deere, Conoco-Phillips, Aflac, and other Fortune 1,000 companies on three continents. His annual speaking commitment typically means 40 Keynotes, 20 Seminars and Workshops and 5-10 Consulting engagements around the world.

A committed writer, Mark has written five books, including the international best seller, *Freedom from Fear* (OVER 100,000 COPIES SOLD!) that has been translated into Japanese and French. Mark is also the author of ten popular e-books: Presenting Like a Pro, Sales Success Strategies, Customer Service Excellence. His monthly e- newsletter goes out to 6,900 people a month since 2003. He posts Tweets and comments on LinkedIn daily.

He is interviewed frequently and has been quoted in the media and has written articles for dozens of magazines. He is considered a thought leader, an idea reporter and agent of change who teaches his clients HOW TO GET MORE OF THE RIGHT THINGS DONE IN LESS TIME. He has done work internationally in Australia, Canada, Aruba, Mexico and Turkey. Furthermore, he has worked in 48 states in the U.S. He resides in Edmonds, WA with his wife of 38 years, Debbie. They have three grown sons. **Mark takes great pride in the fact he has flunked high school English.**



**Kyle Ormiston** has been a trainer and consultant for 7 years. He specializes in helping organizations convert traditional, manual processes to scalable digital workflows that increase efficiency and enable transparency. He has designed workflows and workflow training for brands like Facebook, Box, Tinder, and Atom Tickets. Kyle is delighted to be a part of the Bluebeam Customer Training Team, where he focuses on educating AEC professionals to optimize their workflows using Bluebeam Revu.



**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 15d 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.



**Jonathan Won's** career has spanned technology, manufacturing, business operations, facilities management, business development and strategy, and business governance. Jonathan has worked with various levels of staff from line staff to senior executives, and organized labor to subject matter experts/consultants. He is an accomplished professional with diverse and complex experiences with start-ups, publicly traded for-profit, not-for-profit, governmental, and educational organizations. He has been invited to speak at the yearly Information Today / Internet Librarian Conference and CSULA Health Administration Program. He was also published in the internationally respected

Neuroscience journal and regionally popular Working World career magazine. Jonathan launched and hosted the first several years of the quarterly PMI Los Angeles' largest and most popular publicly accessible business meeting.

Jonathan holds an MPH in Health Services Management from UCLA, a Masters Certificate in IT Project Management from the George Washington University School of Business, a Project Management Professional (PMP) certification from the Project Management Institute (PMI), and a certificate from Toastmasters International.

## Microsoft Project 2016 – Part 1

**New Horizons Computer Learning Center – Anaheim**

**Thursday, January 10, 2019**

**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 23, 2019**

**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.

## Microsoft Excel 2016 – Part 1 (of 3)

**New Horizons Computer Learning Center – Anaheim**

**Thursday, February 14, 2019**

**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, February 27, 2019**

**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**

**Thursday, March 14, 2019**

**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.

## Bluebeam Revu 2018 – ESSENTIALS

Scott Koenig & Kyle Ormiston

Friday, February 22, 2019

7:30 a.m. – 3:30 p.m.

Member: \$100

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!*

Revu Essentials covers all the foundational knowledge and tools that users need for almost every workflow within Revu. In this course, we will focus on becoming familiar with Revu’s interface, navigating the software, creating and editing markups, the Tool Chest & Markups List, as well as Bluebeam Studio. **Revu Essentials is the pre-requisite course for all advanced workflow training.**

## Bluebeam Revu 2018 – ADVANCED

Scott Koenig & Kyle Ormiston

Friday, March 22, 2019

7:30 a.m. – 3:30 p.m.

Member: \$100

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!*

Drawing Management builds upon Revu Essentials, and dives into document security, creating and working with sets, slip sheeting, comparing documents & overlaying pages, search, and advanced features of Bluebeam Studio. This course is ideal for Project Engineers, Project Managers, admins and anyone else who sets up and distributes drawings. This course assumes a strong knowledge of all topics covered in the Revu Essentials course. Students must either take Revu Essentials before this course or pass a placement exam (details TBA).

Quantity Takeoff builds upon Revu Essentials and equips learners to accurately and efficiently complete takeoffs. In this course we focus on calibrating documents, using count and measurement tools and creating and importing Tool Sets. Additionally, we cover best practices for customizing the markups list to provide clear summary reports and best use of Revu’s Quantity Link feature. This course assumes a strong knowledge of all topics covered in the Revu Essentials course. Students must either take Revu Essentials before this course or pass a placement exam (details TBA).

## Time and Task Management for Busy People

Dan DeSalvo

Thursday, March 21, 2019

7:30 a.m. – 2:30 p.m.

Member: Free

Non-Member: \$179

**NEW**

Effective time and task management isn't about controlling time – because we can't. It's about managing how you invest your time, about managing the multiple priorities and tasks that compete for your time and about managing yourself out of unproductive habits that rob you of valuable time. It's only when you learn to manage these two things – your tasks and yourself – that you'll work more efficiently and effectively. You'll also give yourself the time you need to pursue the activities you want to pursue – the activities that make your life more meaningful. Main course topics include: planning your work, working your plan, organization, and taking control of your stress.





## Project Management 1 & 2

**John Koontz**

**Fri. & Sat., February 15 & 16, 2019**

**Day 1: 7:30 a.m. – 4:00 p.m.**

**Day 2: 7:00 a.m. – 11:30 a.m.**

**Member: \$100**

**Non-Member: \$179**

**This two-day course will cover the following topics:**

- **Planning Skills for the Project Team:** All great project managers are master planners; there is no such thing as a great project manager 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’s role and responsibilities in project planning and the three stages of planning; 1) Information Turnover, 2) Preconstruction Planning, and 3) Short Interval Planning.
- **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 affect 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 Management 3 & 4

**John Koontz**

**Fri. & Sat., March 15 & 16, 2019**

**Day 1: 7:30 a.m. – 4:00 p.m.**

**Day 2: 7:00 a.m. – 11:30 a.m.**

**Member: \$100**

**Non-Member: \$179**

**This two-day course will cover the following topics:**

- **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 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 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 with minimal 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, through 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 required to be a successful mechanical project manager. The primary focus of this session is "People Management". Gain an understanding of the essential traits, skills, and behaviors that allow effective management.

## How to Nail Project Interview Presentations

**David Ashcraft & Troy Aichele**

**Thursday, March 28, 2019**

**7:30 a.m. – 3:30 p.m.**

**Member: Free**

**Non-Member: \$179**

Your team gets invited to interview for a project and now you are scrambling to assemble the best team possible, in a limited amount of time, to connect with the audience panel. Don't lose the opportunity to win the business because of bad preparation and poor (or no) presentation practice. You and your team will take away specific techniques and tactics to improve your interview presentations. This class will benefit those with 1 or 20 plus years of experience. The objective of this seminar is to increase the presentation skills of your team when educating, informing and influencing any audience. You will learn the following:

- Presentation preparation, awareness, techniques, and leadership
- How to present verbally, with PowerPoint, whiteboard, and/or supporting materials
- Distracting appearance and auditory behaviors and how to reduce them
- How to connect each team member to the audience by using relevant examples and stories
- How to avoid the Project Executive talking the entire time
- Proven approaches to get your presentation off the ground and to land it effectively
- How to tell a better story. “Pictures are worth a thousand words, stories are worth a thousand pictures”

## Risk Management

**Jonathan Won**

**Friday, March 29, 2019**

**7:30 a.m. – 2:30 p.m.**

**Member: Free**

**Non-Member: \$179**



Risk management is gaining increasing interest and traction as a key practice area of project management. This course helps leaders and managers to understand and apply various tools and techniques for evaluating and mitigating positive and negative risk throughout the project life cycle. Case discussions from various industries are used to broaden the understanding of risk concepts and how different types of risks can affect decision making. Attendees will learn analytical methods for evaluating areas of concern and opportunity for their projects, including project cost and time estimates, analysis of tangible and intangible benefits and threats, and procurement risks to consider. The course provides a methodology for a systematic approach to risk management and discusses project risk management in the context of how to communicate and lead others towards successful outcomes.

### Course objectives:

- Attendees will be able to understand how risk affects the various phases of a project and its stakeholders as well as how to identify different types of risks.
- Given project descriptions, be able to analyze and communicate key risks and potential mitigation strategies for those risks to other stakeholders and management.
- Understand how to apply risk assessment methods, tools or techniques towards developing a risk register and risk management plan.
- Attendees will engage in assignments and activities that explore project and risk management concepts as well as practical techniques for planning, monitoring and controlling risks.

## Project Management 5 & 6

**John Koontz**

**Fri. & Sat., April 12 & 13, 2019**

**Day 1: 7:30 a.m. – 4:00 p.m.**

**Day 2: 7:00 a.m. – 11:30 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. 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.

## Project Engineering Basics in Construction

**Harry Bederian**

**Friday, June 21, 2019**

**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.

## The New Era of Estimating

**Keith Rahn**

**Friday, June 7, 2019**

**7:30 a.m. – 2:30 p.m.**

**Member: Free**

**Non-Member: \$179**

The role of the estimator, which is extremely important to a firm, has evolved over the years. Estimators were seen as individuals who spend hours upon hours taking off and pricing jobs one right after another with little customer contact. Though take off and pricing is part of an estimator's day, many estimators are finding themselves greatly involved in sales and marketing of the company. They are involved in presentations to customers, support existing customer needs, securing new customers, and providing direction for their company. Currently, there is great need for construction professionals to be estimators. This course is perfect for individuals considering estimating as a career option as well as the experienced estimators. The course will provide several opportunities for active participation. Topics covered in this course are: Defining and developing the estimating team, understanding the market and your company, the "art" of negotiating, proper presentation methods, and business writing techniques.



# PEOPLE MANAGEMENT/SKILLS

## **Team and Trust Building 101**

**Mark Matteson**

**Friday, May 17, 2019**

**7:30 a.m. – 2:30 p.m.**

**Members: Free**

**Non-Members: \$179**



Would you like to learn how to build a dynamic, effective team and raise morale and productivity based on trust and enhanced relationships? Soar with strengths. Focus on similarities instead of differences. Course topics include but are not limited to: the art of influence and delegation, accountability and follow up, celebration and acknowledgement, and getting to know your team.



## Sexual Harassment Prevention Training

TBA

Friday, May 10, 2019

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

## Supervising for Safety

Gary Glader

Thursday, May 16, 2019

7:30 a.m. – 11:30 a.m.

Members: Free

Non-Members: \$125

**NEW**

***This workshop is designed for front line supervisors and managers. Safety personnel, risk managers, and executives are also invited to attend.***

Front line supervision is key to the success of any operation, but many front-line supervisors lack the training necessary to succeed in the role. Productive and dependable workers are often promoted into positions of supervision based on their ability to produce a product or service.

Successful safety programs depend on the direct involvement of front line supervisors in the day to day blocking and tackling required to prevent accidents, injuries, and associated costs. Industry leading employers maintain successful safety and risk management programs by providing training in the safety skills necessary to identify and prevent the unsafe behaviors and conditions that lead to injury. This workshop will cover the following skills necessary to supervise a successful safety program:

- Understanding accident causation
- Leadership by example
- Fostering a culture of safety
- Effective accident investigation
- Conducting effective safety audits
- Work area hazard assessment
- Presenting effective safety talks
- Accountability for safety

## Delivering the Ultimate Service Experience: A Guide for Technicians

**Kevin Dougherty**

**Friday, May 31, 2019**

**7:30 a.m. – 3:30 p.m.**

**Members: Free**

**Non-Members: \$179**

This is a class designed to grow and enhance new and current customer relationships. Want to build a force field around your current and new customers? Topics include:

- Developing and using service standards for consistency and customer satisfaction
- How making the customer look good ensures your survival onsite
- Adding and leveraging the value on what you already do
- Changing the perceptions on how your technicians and dispatchers are perceived
- Getting your technicians and dispatchers to take more of a consultative sales approach
- Turning customer issues and complaints into opportunities
- Turn your technicians and dispatchers into solution providers
- Front-line relationship building strategies and tactics
- Empowering your dispatchers and service technicians to take care of customer issues on the spot
- Technician selling techniques
- Recorded technician sales training role plays

## 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.





## WEBCASTS ARE AVAILABLE AT [WWW.CPMCA.ORG](http://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 brining 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  
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Burbank, CA 91505**

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