



CPMCA

California Plumbing & Mechanical
Contractors Association

Seminar Catalog

January–June
2020

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

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CPMCA Executive Committee, Board of Directors

Executive Committee

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Bryan Suttles, Vice President

Suttles Plumbing & Mechanical Corporation

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ACCO Engineered Systems

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ARB, Inc.

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Murray Company

Travis Craven

All Area Plumbing, Inc.

Beni Monaco

Monaco Mechanical

Bryan Suttles

Suttles Plumbing & Mechanical Corporation

CPMCA Staff

Chip Martin

Executive Director

Michelle Lynn

Director of Education

Dana Giambalvo

Office Manager

Letter from the Executive Director

We are excited to present you with CPMCA's 13th semi-annual Seminar Catalog (featuring classes January – June 2020)! We are going back to the basics, offering the popular computer, project management, cost and change order classes, while also introducing you to a few new topics by your request. Learn about the effectiveness of single-tasking, how to bridge generational gaps in your workplace, and we've restructured our Estimating class to offer you a longer 1½ day beginner class (the advanced class will be offered later in the year).



Your feedback is important; thus, we strive to structure our classes to meet your needs while also addressing the industry's most relevant and current topics. We hope you find this year's course selection valuable in your personal and professional growth. Some important information and reminders:

- All classes listed in this course guide are approved and will count toward the Journeyman Upgrade Training (JUT) requirement. Please take advantage of these valuable learning opportunities. Visit www.uniontopics.com/journeyman-training for more information.
- As of August 30, 2019, the deadline for covered employers to have provided sexual harassment prevention training to all non-supervisory employees is now January 1, 2021. Employers who have already trained supervisory and/or non-supervisory employees in 2019 will not be required to retrain until 2021.

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 2020.

January

15	Microsoft Project 2016 – Part 1
22	Microsoft Project 2016 – Part 2

February

13	Microsoft Excel 2019 – Part 1
14-15	Project Management 7 & 8
27	Microsoft Excel 2019 – Part 2

March

5	Microsoft Excel 2019 – Part 3
6-7	Project Management 9 & 10
11	Essentials of Communication & Collaboration

April

3	Change Order Management
15	Bluebeam – BEGINNER
22	Bluebeam – ADVANCED
17-18	Project Management 11 & 12
23	Project Manager's Impact on Financial Outcomes

May

8	Single-Tasking to Be More Productive
14	How to Handle Difficult People
15	Building Bridges Between Generations
29	A Foreman's Field Guide to Developing Your Workforce

June

5-6	Estimating BEGINNER
19	Sexual Harassment Prevention Training
26	Project Engineering Basics in Construction

How to Register for CPMCA Classes

There are two ways to register:

- 1) Go to 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.
- 2) 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 would like to be added to the email distribution list, please email michelle@cpmca.org.

Computer Skills & Technology

- Microsoft Project 2016 – Part 1
Wednesday, January 15, 2020
- Microsoft Project 2016 – Part 2
Wednesday, January 22, 2020
- Microsoft Excel 2019 – Part 1
Thursday, February 13, 2020
- Microsoft Excel 2019 – Part 2
Thursday, February 27, 2020
- Microsoft Excel 2019 – Part 3
Thursday, March 5, 2020
- Bluebeam – BEGINNER
Wednesday, April 15, 2020
- Bluebeam – ADVANCED
Wednesday, April 22, 2020

Estimating

- Estimating BEGINNER
Fri. & Sat, June 5-6, 2020

Foreman

- A Foreman's Field Guide to
Developing Your Workforce
Friday, May 29, 2020

Management

- Change Order Management
Friday, April 3, 2020

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"

- Single Tasking to Be More Productive
Friday, May 8, 2020

Project Management

- Project Management 7 & 8
Fri. & Sat., February 14-15, 2020
- Project Management 9 & 10
Fri. & Sat., March 6-7, 2020
- Project Management 11 & 12
Fri. & Sat., April 17-18, 2020
- Project Manager's Impact on Financial Outcomes
Thursday, April 23, 2020
- Project Engineering Basics in Construction
Friday, June 26, 2020

People Management

- Essentials of Communication and Collaboration
Wednesday, March 11, 2020
- How to Handle Difficult People
Thursday, May 14, 2020
- Building Bridges Between Generations
Friday, May 15, 2020

Sales/Service/Safety

- Sexual Harassment Prevention Training
Friday, June 19, 2020

- 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 75, Week 2 – University of Texas, Austin, TX	January 12-16, 2020
IPM Class 76, Week 2 – University of Texas, Austin, TX	January 13-17, 2020
Advanced IPM - Class 16 - University of Texas, Austin, TX	January 19-24, 2020
Safety Directors' Conference – San Antonio, TX	January 21-23, 2020
MCAA Technology Conference – San Diego, CA	January 29-31, 2020
MCAA Annual Convention – Wailea, Maui, HI	March 15-19, 2020
IPM Class 77, Week 1 – University of Texas, Austin, TX	April 19-23, 2020
IPM Class 78, Week 1 – University of Texas, Austin, TX	April 20-24, 2020
National Issues Conference – Washington, DC	May 5-7, 2020
Fabrication Conference – Des Moines, IA	May 11-13, 2020
Field Leaders Conference – Kansas City, MO	May 13-15, 2020
Women in the Mechanical Industry Conference – Austin, TX	June 15-17, 2020

MCAA Contacts:

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

For conference & conventions, contact Melissa Funyak at mfunyak@mcaa.org

For Advanced Leadership Institute and/or Institute for Project Management contact Amy Harding at amy@hardingworks.org

For online webcasts & technology conference, contact Sean McGuire at smcguire@mcaa.org

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



Plan Accordingly! Take note of this important CPMCA Event:

CPMCA Annual Golf Tournament – Lakeside Golf Club, Burbank, CA	Monday, August 17, 2020
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CPMCA Contacts:

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

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



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.



Nic Bittle is the founder of Work Force Pro and works with contractors that want to prepare and develop their workforce to lead with impact, act like a pro, and perform at their best on a daily basis. He does this in a variety of different ways. Through presentations and workshops, through tools that he has developed which are designed to support the learning process, and through a unique information delivery system called D.R.I.P. Information™. He is the architect of two performance improvement process curriculums, that use the D.R.I.P. Information™ process that are specifically

Designed to prepare and develop our current and next generation work force for the roles and responsibilities that lie ahead. Nic is author of three books, *Small Business*, *BIG Mistakes*, *Perform Like the Boss!* and *Good Foreman; Bad Foreman*.



Rebecca Campbell is a long-time teacher/trainer. Having taught ninth-grade English, it is no wonder she enjoys teaching our brothers and sisters! After her tenure as a teacher, Rebecca came to Pan-Pacific Mechanical as the Director of Risks where she oversees the safety department as well as the company's claims and lawsuits. She is a true safety-nerd and wants nothing more than to find ways to engage people in their jobs with safety always in their mind.



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.



As a speaker and presenter, **Eric Herdman** has trained employees in a broad range of corporate environments for more than 20 years. From multi-billion dollar pharmaceutical companies to top financial institutions and the world's largest franchise fitness center, he uses his accomplishments in sales, retail, health and fitness to help companies achieve top-level success.

Focusing on results, Eric has successfully facilitated a variety of courses related to strategic business practices, leadership and management, productivity and motivation. Eric has developed a proven system that helps students prioritize their work, effectively schedule their days, delegate to employees, manage information flow and teach negotiation skills. As a record setting ultra-runner, he also shares his passion for perseverance and endurance with his students.



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 publisher, 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, New York Mutual Life and other Fortune 500 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.



For more than 15 years, **Allison McBrayer** has been traveling to client locations to provide hands-on training. What drives Allison is engaging with clients and helping them see and interact with software in a different way by making complex concepts understandable to all. After vacationing in San Diego, Allison decided to make it her home base when not travelling the country and the world for work and play. It should come as no surprise then, that as a Sr. Software Trainer, she is always eager to hit the road and meet our Bluebeam clients.



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



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

Microsoft Project 2016 – Part 1

New Horizons Computer Learning Center – Anaheim

Wednesday, January 15, 2020

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 22, 2020

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 2019 – Part 1 (of 3)

New Horizons Computer Learning Center – Anaheim

Thursday, February 13, 2020

8:00 a.m. – 4:00 p.m.

Member: Free

Non-Member: \$299



This course aims to provide you with a foundation for Excel knowledge and skills, which you can build upon to eventually become an expert in data manipulation. Excel can help you organize, calculate, analyze, revise, update, and present your data in ways that will help the decision makers in your organization steer you in the right direction. If you're interested in learning how to use Excel or responsible for creating spreadsheets or performing basic data manipulation, this course is perfect for you. It will also make these tasks much easier for you to accomplish, and in much less time, than if you used traditional pen-and-paper methods or non-specialized software. 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 2019. 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 2019 Part 2!

Microsoft Excel 2019 – Part 2 (of 3)

New Horizons Computer Learning Center – Anaheim

Thursday, February 27, 2019

8:00 a.m. – 4:00 p.m.

Member: Free

Non-Member: \$299

This course builds upon the foundational knowledge presented in the Microsoft® Office Excel® 2019: Part 1 course and will help start you down the road to creating advanced workbooks and worksheets that can help deepen your understanding of organizational intelligence. This course is designed for students who already have foundational knowledge and skills in Excel 2019 and who wish to begin taking advantage of some of the higher-level functionality in Excel to analyze and present data. To ensure success, students should have completed Microsoft® Office Excel® 2019: Part 1 or have the equivalent knowledge and experience. The ability to analyze massive amounts of data, extract actionable information from it, and present that information to decision makers is at the foundation of a successful organization that is able to compete at a high level. 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. Use PivotTables and PivotCharts. The final stop, Excel 2019 Part 3 is just around the corner!

Microsoft Excel 2019 – Part 3 (of 3)

New Horizons Computer Learning Center – Anaheim

Thursday, March 5, 2020

8:00 a.m. – 4:00 p.m.

Member: Free

Non-Member: \$299

This course builds upon the foundational and intermediate knowledge presented in the Microsoft® Office Excel® 2019: Part 1 and Microsoft® Office Excel® 2019: Part 2 courses to help you get the most of your Excel experience. The ability to collaborate with colleagues, automate complex or repetitive tasks, and use conditional logic to construct and apply elaborate formulas and functions will put the full power of Excel right at your fingertips. The more you learn about how to get Excel to do the hard work for you, the more you'll be able to focus on getting the answers you need from the vast amounts of data your organization generates. This course is intended for students who are experienced Excel 2019 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. To ensure success, students should have practical, real-world experience creating and analyzing datasets using Excel 2019. 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.

Bluebeam Revu 2018 – ESSENTIALS

Scott Koenig & Allison McBrayer

Wednesday, April 15, 2020

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 & Allison McBrayer

Wednesday, April 22, 2020

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.

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.



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Change Order Management

Stephane McShane

Friday, April 3, 2020

7:30 a.m. – 11:30 a.m.

Member: Free

Non-Member: \$179



Effective change order management can dramatically reduce a subcontractor's risk and increase profitability. This four-hour interactive course explores the change order process from a subcontractor's view point and provides participants with hands on training in recognizing, scoping, pricing, and negotiating change orders. This course culminates in a mock negotiation where participants can immediately practice the skills that they have learned.

Learning Objectives:

- How to properly notify owners and general contractors of changed conditions to reserve your rights
- How to scope, price and sell a change order
- Negotiation strategies to maximize outcomes

Single Tasking to Be More Productive

Rebecca Campbell

Friday, May 8, 2020

7:30 a.m. – 11:30 a.m.

Members: Free

Non-Members: \$179



When was the last time you gave 100% of your attention to, well, anything? In a world where people are praised for multi-tasking, it's time to stop and think how much energy you waste switching from one activity to another. It's time to single-task your way to a more productive day. Studies have shown that doing one thing at a time makes you more productive, lowers stress, and increases happiness. Using mindfulness techniques that aren't too touchy-feely, we will examine the power of single-tasking and how you can get more done by slowing down and focusing. When you are in the present moment, you can be calm, collected and more productive. Who wouldn't want more time in their day?

Project Management 7 & 8

John Koontz

Fri. & Sat., February 14-15, 2020

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:

- **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.
- **Time Management Skills and Managing Multiple Projects:** Project management is a dynamic and challenging thing to do for a living. It creates numerous time management challenges for the project manager and causes daily chaos that must be successfully managed in a way that maintains project productivity, project profitability, and customer relationships. Effective and efficient managers of time who can successfully manage multiple projects are therefore invaluable to their firms. Improving time management ability for a project manager or foreman is a difficult proposition that takes great personal commitment and self-discipline. This session identifies the greatest time wasters and provides strategies for improving time management skills. Students will also identify and discuss the best practices required for becoming a better manager of multiple projects.

Project Management 9 & 10

John Koontz

Fri. & Sat., March 6-7, 2020

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:

- **High Impact Communication Skills:** Due to the complexity of the construction process and the numerous people involved in a project's completion, excellent communication skills are required to succeed at project management. When communication problems develop, relationships usually weaken, misunderstandings occur, and project failure is imminent. Excellent communication skills are

PROJECT MANAGEMENT

CONTINUED

essential to creating a successful project and a successful career. Communication is always difficult on a construction project and the best project managers know that it's an issue, which requires a project manager's constant attention, evaluation, and improvement. This session will cover vital communication topics such as: effective listening, questioning, public speaking and presentation, basic written communication, clear explanation, accepting the burden of communication.

- **Negotiating:** Basic Negotiating Skills: Mechanical project managers spend a substantial part of each day negotiating with everyone in which they interact: they negotiate numerous items including payment, customer issues, change orders, subcontracts, equipment and material purchases, rental equipment rates, submittal and shop drawing approval, time and space allocation, back charges, etc.. Ironically, most mechanical project managers have no formal training in negotiating; putting them at a great disadvantage when dealing with seasoned, well-trained negotiators. This session provides basic skills to improve negotiating abilities and increase your comfort level when negotiating.
- **Critical Leadership Skills:** Strong leadership skills are synonymous with successful project management. The long-term success of a project manager largely depends on their leadership ability in creating and managing highly effective and productive project teams. There is no such thing as a great project manager who is a weak leader. To have successful projects and a successful career, project managers must develop critical leadership skills. This session provides an understanding of these critical leadership skills.

Project Management 11 & 12

John Koontz

Fri. & Sat., April 17-18, 2020

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:

- **Profitably Managing Your Subcontractors:** Subcontractors represent a significant portion of most mechanical contracts, and the performance of your subcontractors is a direct reflection of your own performance in the eyes of an owner, construction manager, or general contractor. The project manager's effective management of subcontractors ensures a successful project that is profitable, completed on time, and completed within budget. When the project manager and foreman properly manage mechanical subcontractors, mechanical contractor risk is low, customer satisfaction is high, and strong long-term relationships are developed between the mechanical contractor and their subcontractors.
- **Successful Survival of Project Closeout:** The end of a project is usually a challenging and difficult time for the project manager and the foreman. Unfortunately there is no magic formula, wand, or pill for eliminating the difficulty of project closeout. There are, however, several tactics and strategies the project manager can implement to improve end-of-job performance and mitigate the difficulties of project closeout. In addition to a review of innovative methods used by MCAA contractors to help reduce the typical end of project "profit/productivity drain," this session will include the following

project closeout topics: Beginning the project with the end in mind, Creating the Exit Plan, Punch list Warranties, As-built drawings, O & M manuals, Customer satisfaction, Closeout productivity improvement, Demobilization, Third party commissioning, Change order finalization, Final payment, Feedback meeting.

- **Best Practices of the Industry's Best Project Managers:** Why are some project managers in our industry consistently more successful, project after project, than their peers? What separates the "great" ones from the "good" ones? While age, experience, attitude, and talent are important factors in a project manager's success, the instructor has identified, and will share, the best practices and skills that can be learned by any project manager who has the attitude, aptitude, and desire to improve and succeed. John will include an overview and in-depth discussion of the many of the best practices used by the industry's best project managers. It also provides a review of the traits and qualities that are the common denominators among excellent project managers.

Project Manager's Impact on Financial Outcomes

David Ashcraft

Thursday, April 23, 2020

7:30 a.m. – 3:30 p.m.

Member: Free

Non-Member: \$179

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



PROJECT MANAGEMENT

CONTINUED

Project Engineering Basics in Construction

Harry Bederian

Friday, June 26, 2020

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.

ESTIMATING

Estimating BEGINNER

Keith Rahn

Fri. & Sat., June 5-6, 2020

Day 1: 7:30 a.m. – 3:30 p.m.

Day 2: 7:30 a.m. – 11:00 a.m.

Member: \$50

Non-Member: \$179

Estimating ADVANCED 2-day class will be offered in the latter half of 2020; stay tuned!

Being an estimator in the mechanical industry is a challenging and rewarding opportunity for you. Proper estimating skills and accurate costing are critical to the success of your company. This course is designed to provide you with basic understanding the estimator's role and an introduction of techniques used in estimating. This course is designed for individuals who are entering or new to the position of estimator, project manager, field supervision or support staff.

Topics covered during the session are:

- Role of the estimator
- Types of bids
- Estimate structure
- Construction documents and the estimate
- Quantifying by the use of take-off techniques
- Material costing
- Labor and the MCA Labor Estimating Manual (LEM)
- Subcontractors and scope alignment
- Finalizing the estimate and writing a quotation



A Foreman's Guide to Developing Your Workforce

Nic Bittle

Friday, May 29, 2020

7:30 a.m. – 3:30 p.m.

Member: Free

Non-Member: \$179

This class is for Supervisors, Foreman, Key Journeyman & Future Leaders.

Step I: What Smart Leaders are Doing to Develop Their Workforce

When we can develop a group of individuals to perform like a team great things can happen. In A Foreman's Field Guide to Developing Your Workforce, Nic will walk your foremen and supervisors through how to develop their team for longterm success. As natural mentors on the jobsite it is up to the Foremen and Supervisors to develop their crew to be the next leaders of the industry. In this program your Supervisor/Foreman will learn:

- The 4 Core Competencies lacking in most of the workforce entering the industry today.
- How to develop those competencies within your team while on the job.
- How to develop each team member so that everyone performs at their best and communicates on a higher level.
- How to develop initiative in others.
- Why we must step up and lead & the cost if we do not.
- How to navigate the different mindsets and personalities our leaders encounter on a daily basis.
- The tips, tricks, tactics, and techniques a foreman and/or supervisor must master to effectively lead in today's market.

Step II: How Effective Leaders Get More Out of Their Crew on a Daily Basis

A Foreman's Field Guide Step II is a next step look at how to get more out of your crew on a daily basis. In Step I we laid the foundation for developing and mentoring your crew. Now it is time to take it a step deeper. How do you push your crew without alienating them? How do you deliver criticism that will change a crewmembers behavior without changing their attitude for the worse? How do you develop a work ethic and initiative in a generation that many not possess these behaviors and skills? In this program your Supervisor/Foreman will learn:

- How to break down the communication barriers between a foreman and his or her crew.
- The best way to set expectations that will stick with your crew.
- How to develop each team member so that everyone performs at his or her best on a daily basis.
- How to identify the next leader and begin to groom them for that position.
- How to develop a work ethic in the next generation.
- How to deal with conflict on the job.
- How to deliver constructive criticism that won't end in a fight.
- The tips, tricks, tactics, and techniques a foreman and/or supervisor must master to effectively lead in today's market.

PEOPLE/MANAGEMENT SKILLS

Essentials of Communication and Collaboration

Eric Herdman

Wednesday, March 11, 2020

7:30 a.m. – 2:30 p.m.

Members: Free

Non-Members: \$179



No matter what your job, you need the ability to work effectively with others. And, if you are also able to bring out the best in everyone you work with, the sky's the limit for your success. Top executives repeatedly tell us that the employees who stand out are the ones with great communication and collaboration skills. In fact, most of them rank that capability higher than technical know-how. In this course, you'll learn how to work with people more effectively in all kinds of business circumstances: one-on-one situations... temporary work groups... or even long-term teams. You will: master tools for fostering a collaborative environment, learn communication essentials for effective collaboration, learn how to build work relationships that kick-start the collaborative process, learn one-on-one and group collaboration tactics and techniques for success, and learn how to work through disagreements and conflicts.

Building Bridges Between Generations

Mark Matteson

Friday, May 15, 2020

7:30 a.m. – 2:30 p.m.

Members: Free

Non-Members: \$179



This session will cover the following: Defining Millennials, Gen X'ers, Boomers and Traditionals, discover the 10 ideas for managing millennials, learn how each generation is formed (values, experience, music), learn how to improve your existing relationships with Gen X'ers and Millennials, embrace tools for change, 3 things millennials hate (and love), how millennials think differently and why that's a good thing, how we are the same (what everyone from 8-88 years of age want), how to attract and retain good people.

How to Handle Difficult People

Dan DeSalvo

Thursday, May 14, 2020

7:30 a.m. – 2:30 p.m.

Members: Free

Non-Members: \$179



This course provides the specific tools you need to take back control, reduce stress, raise morale, and increase productivity. You will learn to correctly identify difficult behavior and its sources. You will be provided what you need to understand difficult people. And you'll learn concrete ways to deal with these challenges so that the repetitive patterns finally cease. You will: raise your awareness and understanding of difficult behavior, examine your own reaction to others' behavior, learn self-defeating actions that increase difficulties and solutions that bring immediate, positive results, and how to take positive steps to successfully overcome negativity and people-proof your life from negativism.

Sexual Harassment Prevention Training

Rebecca Campbell

Friday, June 19, 2020

7:30 a.m. – 9:30 a.m.

Members: Free

Non-Members: \$125

On August 30th, 2019, Governor Newsom signed SB 778 which delays the implementation of the new sexual harassment prevention training requirements and any refresher training. Effective immediately, SB 778 makes the following modifications to the existing sexual harassment prevention training requirements to SB 1343:*

- The deadline for covered employers to have provided sexual harassment prevention training to all non-supervisory employees is now January 1, 2021.
- Employers who have already trained supervisory and/or non-supervisory employees in 2019 will not be required to re-train until 2021.

SB 1343 states that by January 1, 2020, California employers with at least five (5) employees **MUST provide sexual harassment prevention training (SHPT) and education to all supervisory and non-supervisory employees. All employees must be trained in the 2019 year. All employees trained in 2018 must retrain in 2019 under the new law. **TWO (2)** hours of SHPT to all supervisors. **ONE (1)** hour of SHPT to all non-supervisory employees.*

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. Contact Michelle at michelle@cpmca.org to register.



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.

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 & Journeyman Training Trust Fund processes class assignments for Union members.

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 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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