



CPMCA

California Plumbing & Mechanical
Contractors Association

Mechanical Construction Education Alliance (MCEA)

Seminar Catalog July-December 2022

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

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CPMCA Executive Committee, Board of Directors

Executive Committee – 2022/2023

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Steve Fosdick, Vice President

Murray Company

Jason Gordon, Secretary

Xcel Mechanical Systems, Inc.

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Dan Naylor

Murray Company

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Suttles Plumbing & Mechanical Corporation

CPMCA Staff

Chip Martin

Executive Director

Dana Giambalvo

Office Manager

Michelle Lynn

Director of Education

It is hard to believe we are already halfway through the year. In April, we officially returned to in-person classes and were pleasantly surprised by the overwhelming interest. We appreciate the support and hope you have enjoyed being back in the classroom.



We are excited to present you with the 18th semi-annual Mechanical Construction Education Alliance (MCEA) Seminar Catalog (July – December)! We have a host of new classes covering leadership, conflict management, negotiating change orders, scheduling, and the estimator/project manager relationship. We believe that our careful selection of classes and topics will help to enrich and provide you with tools to immediately apply to your work. We are putting some finishing touches on our new training room and hope you will come and visit for a class soon!

CPMCA strives to structure its 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. 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!

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.

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.

SCHEDULE AT A GLANCE BY MONTH

The following is a list of the classes offered during the second half of 2022.

August

- 17 Managing Multiple Projects, Objectives, and Deadlines
- 18 Conflict Management: Project, Service, and Office Team Strategies and Skills
- 26-27 Foreman Training 1 & 2

September

- 14 Microsoft Excel 2019 – Part 1*
- 20 Bluebeam BEGINNER
- 22 Project Manager's Impact on Financial Outcomes

October

- 5 Microsoft Excel 2019 – Part 2*
- 6 Bluebeam INTERMEDIATE
- 12 Scheduling
- 13 Situational Leadership Skills
- 14-15 Foreman Training 3 & 4
- 20 Microsoft Excel 2019 – Part 3*

November

- 1 Bluebeam ADVANCED
- 3 Examining the Relationship Between the Estimator and Project Manager

December

- 1 Building and Negotiating the Case to Win – Claims & Change Orders

***These classes have been pre-scheduled and will remain as VIRTUAL classes.**

*****All classes listed in this course guide are approved and will count toward the Journeyman Upgrade Training Requirement. Please take advantage of these valuable opportunities. Visit www.ajtraining.org for more information.**

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) 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.



Computer Skills & Technology

- Microsoft Excel 2019 – Part 1
Wednesday, September 14, 2022
- Bluebeam BEGINNER
Tuesday, September 20, 2022
- Microsoft Excel 2019 – Part 2
Wednesday, October 5, 2022
- Bluebeam INTERMEDIATE
Thursday, October 6, 2022
- Microsoft Excel 2019 – Part 3
Thursday, October 20, 2022
- Bluebeam ADVANCED
Tuesday, November 1, 2022

Foreman

- Foreman Training 1 & 2
Fri. & Sat., August 26-27, 2022
- Foreman Training 3 & 4
Fri. & Sat., October 14-15, 2022

Project Management

- Managing Multiple Projects, Objectives, and Deadlines
Wednesday, August 17, 2022
- Project Manager's Impact on Financial Outcomes
Thursday, September 22, 2022
- Scheduling
Wednesday, October 12, 2022
- Examining the Relationship Between the Estimator and Project Manager
Thursday, November 3, 2022
- Building and Negotiating the Case to Win – Claims & Change Orders
Thursday, December 1, 2022

People Management

- Conflict Management: Project, Service and Office Team Strategies and Skills
Thursday, August 18, 2022
- Situational Leadership Skills
Thursday, October 13, 2022

Webcasts

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

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

IMPORTANT EVENTS



Plan Accordingly! Take note of these important MCAA Events:

IPM Class 81, Week 2 - Austin, TX

September 25-29, 2022

IPM Class 82, Week 2 - Austin, TX

September 26-30, 2022

2022 MCAA Great Futures Forum - Newton, MA

September 29 - October 1, 2022

Field Leaders Conference - Indianapolis, IN

October 12-14, 2022

IPM Class 83, Week 1 - Austin, TX

October 23-27, 2022

IPM Class 84, Week 1 - Austin, TX

October 24-28, 2022

2022 Fabrication Conference - Seattle, WA

November 2-4, 2022

Field Leaders Conference - Kansas City, MO

November 2-4, 2022

2022 Industry Improvement Funds Conference - Longboat Key, FL November 30-December 2, 2022

MCAA Contacts:

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

For conference & conventions, contact Melissa Rogers at mrogers@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:

SAVE THE DATE!

CPMCA Annual Golf Tournament - Newport Beach Country Club

Monday, August 29, 2022

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**.



Troy Aichele became involved with the mechanical contracting industry while obtaining his B.S. degree in Construction Management 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. 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.



Leah Gutmann, owner of First Forward Consulting, LLC, specializes in a wide variety of training, program development, design, and consulting services including communications, leadership, emotional intelligence, instructor training, and financial training. She has over 13 years of experience in the design, implementation and facilitation of educational programs, classes and seminars for the mechanical contracting industry. Her 20-year career as a CFO and Finance Manager in the industry has given Leah the unique ability to offer training and consulting from a hands-on, in the trenches perspective. Leah's client base includes several MCA affiliates and JATC programs across the country as well as individual mechanical contractors both large and small. Leah has been involved in developing and delivering a wide variety of programs at all levels of an organization from executive level leaders to field employees and supervisors.

Leah is a certified instructor for Fierce Conversations and Fierce Accountability & Feedback. In addition, she holds certifications for Training Program Design, Strength Finders Coaching, DISC, Emotional Intelligence, Checkpoint 360, Profiles XT, Clifton Strengths Finders, and Blanchard's Situation Leadership II.

2022 INSTRUCTORS



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.



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.



Stephane 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. Stephane possesses the rare combination of talent from being in the field as an apprentice, electrician, foreman, then working her way through each operational chair within a successful electrical construction firm. Her ability and drive defined her to be "best in class" at each position held. This talent is what makes her tremendously effective at operational and organizational assessments today. She has successfully conquered every operational position from being an estimating trainee through executive management. She has built, trained, and led her teams to become the undisputed leaders in their markets. She is able to quickly identify organizational positives and negatives and assess appropriate action steps and throughputs.



Gary Polain is the Principal of OzMosis Leadership based in Kirkland, Washington. A native born Western Australian, he began his professional career as a Mechanical Engineer specializing in power station design, dust pollution control and mine ventilation systems. Gary has over the last 32 years committed himself to a most accomplished career in "Human Engineering."

Prior to starting his own consulting practice in 1996, Gary worked with Priority Management Systems, beginning 1991 in Sydney as Australasian Sales and Marketing Manager. He was transferred to the Seattle international head office, in 1992 as Vice President Business Development and then to Bath, England in 1994 to head up the European expansion. A final term with Priority Management in Atlanta, led to the illuminating realization that owning his own consulting practice was the most practical way to get control of his own destiny in 1996.

A highly practical and motivating Coach, Facilitator and Speaker, Gary has been described as, "very good at combining processes and people to make an enjoyable learning environment that helped our employees retain and apply the knowledge."

He has given keynote presentations throughout Australia, Canada, USA and England, and has either trained and coached over 19,000 people. He consults to multi-national corporations, small businesses, associations and community service groups on a variety of subjects including: Strategic Thinking, Executive Coaching, Leadership Development, Sales & Negotiation Skills and Team Development.

He is also the Vistage Chairman for a 'Small Business' group of CEOs and Presidents in Seattle. Gary is the father of two children. He balances his lifestyle by being an active golfer, squash player and musician.



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.



Pre-fabrication with Revit has been a passion of **Christopher Suggs** since before Autodesk acquired MAP Software. At the time, Suggs was building fabrication level content for customers, a painstaking task, because he believed in the Revit engine. Since the acquisition, it has been an exciting and patient journey as the fabrication tools continue to find their way into Revit. Building RFA fittings is a past-time Suggs does not miss, and he can now focus on helping customers take their databases they have been using in CAD for so many years and turning them into Revit friendly versions of their previous selves, as well as building databases from the ground up to support

specific needs of the end user.

COMPUTER SKILLS/TECHNOLOGY

Microsoft Excel 2019 – Part 1 (of 3)

New Horizons Computer Learning Center – ONLINE CLASS

Wednesday, September 14, 2022

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 – ONLINE CLASS

Wednesday, October 5, 2022

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 – ONLINE CLASS

Thursday, October 20, 2022

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 – BEGINNER

Christopher Suggs

Thursday, September 20, 2022

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$299



This session will focus on getting you acquainted with the interface and out-of-the-box every-day tools. Agenda will include:

Revu Basics: Interface, Navigation and Profiles, Document Manipulation, Markup Tools, Stamps, Tool Chest, Markup List

Revu Document Control: AutoMark & Page Extraction, Creating a Navigable Drawing Set, Document Comparison & Overlay Pages, Sets

Revu Measurements & Takeoffs: Calibration, Measurement Tools, Custom Measurement Tools & Legends, Basic Estimation in the Markups List

COMPUTER SKILLS/TECHNOLOGY

Bluebeam – INTERMEDIATE

Christopher Suggs

Thursday, October 6, 2022

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$299

In this session, we'll get under the hood of Revu to get a deeper understanding of every-day tools as well as building custom content. Agenda will include:

Interface, Navigation, & Profiles (In Depth): Toolbars & Menus, Panel Access Bar & Panel Management, Profiles & Profile Management, Standardizing Profiles, Opening a PDF, PDF Navigation

Markup Tools: Types of Markup Tools, Customizing the Properties of Markup Tools, Using the Snapshot Tool

Stamps: Applying a Stamp, Creating Custom Stamps

Tool Chest: Basics of the Tool Chest, Custom Tool Sets, Creating Legends, Adjusting & Updating Legends

Bluebeam – ADVANCED

Christopher Suggs

Tuesday, November 1, 2022

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$299



This last session will focus on advanced tools and workflows for extracting data and collaborating in the cloud. Agenda will include:

Markups List: Organizing, Sorting, & Filtering, Statuses, Custom Columns, Importing & Exporting, Custom Formulas, Quantity Link & Excel Templates

Revisions: Inserting Sheets & Batch Insert, Sets, Overlaying Sheets & Batch Overlay, Document Comparison, Updating a Takeoff

Introduction to Studio: Sessions vs. Projects, Getting into Studio

Studio Sessions: Setting up a New Session, Live Session Participation, Record Reports, Closing out a Studio Session

Studio Projects: Setting up a New Project, Inviting Attendees & Setting Permissions, Working with Documents, Viewing Revisions History

Managing Multiple Projects, Objectives, and Deadlines

Eric Herdman

Wednesday, August 17, 2022

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179



Employees are constantly faced with multiple projects and too many deadlines, all of which have top priority. Managing competing projects, objectives and deadlines requires concentration, skill and dedication. Develop a tool kit of techniques and tactics to employ when scheduling project actions, managing deadlines and delegating tasks. The proven methods of planning, executing and monitoring provided in this course will facilitate productive project results. Apply standards for managing priorities and reap the benefits of respect, trust and accountability. Implement a plan for productivity using a scope management plan and project portfolios; and in instances where deadlines are missed and the project stalls, use techniques from this course to positively push forward. This class will cover the following:

- Finding Value Across Multiple Projects
- Preparing to Handle Competing Priorities
- Managing and Setting Achievable Objectives
- Planning to Increase Project Performance and Productivity
- Scheduling and Establishing Accountability
- Identifying Risk and Limiting Burnout

Project Manager's Impact on Financial Outcomes

David Ashcraft

Thursday, September 22, 2022

7:00 a.m. – 2:00 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. The 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. Not to be missed!

PROJECT MANAGEMENT

Scheduling

Troy Aichele

Wednesday, October 12, 2022

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

Learn about all the different types of schedules used in construction, their benefits and challenges along with how to optimize their uses. Best practices will also be discussed using real-life instructor project examples for building, maintaining, and managing them. Participants will learn the following from this class:

- The basics of reading a CPM schedule, analyze logic, critical path, and float as well as how to break it down into a mechanical only schedule for manpower loading, documentation, equipment deliveries and installation planning
- How to build and manage a commissioning/project closeout schedule including controls installation progress monitoring
- Pull planning basics, how to run a pull planning meeting and best applications (design progress schedule, overall construction, and commissioning/project closeout schedules)
- Best uses for short interval planning schedules
- How to analyze and negotiate a mutually agreeable BIM coordination schedule that works with a fabrication schedule
- Common schedule terms and definitions along with schedule specific contract language to include and schedule specific contract language to avoid

Examining the Relationship Between the Estimator and the Project Manager

Keith Rahn

Thursday, November 3, 2022

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

In everyday operations, the estimator and project manager are extremely busy with their everyday responsibilities, one key responsibility being loss. The responsibility for each of them is to effectively communicate information. It is very common in today's fast paced work for projects not to be properly turned over from the estimator and a thorough post construction conference not being conducted by the project manager. In both cases, valuable information is being lost through improper lines of communication. Knowing the true cost of doing business is essential for companies to survive and that knowledge comes from communications between the estimators and project manager. This workshop is designed for both estimators and project managers from each company to attend and work together. We will discuss importance of teamwork, relationship between each role, methods to improve communication and support, pre- and post-construction reviews, and allow participants to develop a plan of action for their company.

Building and Negotiating the Case to Win – Claims & Change Orders

Stephane McShane

Thursday, December 1, 2022

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179



In this session, attendees will discuss contract risk management and preservation of rights in order to increase the chances of financial recovery during project execution. The basics of preparing that documentation and effectively translating the information will be discussed. Attendees will gain understanding and review examples of risky contract clauses, the process of claims management, the legalities of change order control, and preparation for lawsuits. Attendees will also learn how to develop and effectively plan a strategy for any negotiation; improve persuasion skills; and learn tools, techniques and practical strategies for negotiation success. Compromise is a no-win situation for either party in a negotiation, yet is the most commonly used methodology. We will utilize a mock change order negotiation in order to prove the theory of collaboration versus confrontation. The instructor will discuss the emotional challenges that prevent or hinder successful negotiations, outline the steps necessary to achieve collaborative outcomes, define the communication skills necessary to de-escalation conflict to achieve a buildable space, display the difference between compromise and collaboration.

Foreman Training 1 & 2

John Koontz

Fri. & Sat., August 26-27, 2022

Friday: 7:00 a.m. – 2:00 p.m.

Saturday: 7:00 a.m. – 12:00 p.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

- **Planning Skills for the Project Team:** All great project Foremen are master planners; there is no such thing as a great foreman who is a “decent” planner. All wildly successful projects are incredibly well planned by all members of the project team; project manager, foreman, fabrication manager, coordination manager, safety manager, warehouse manager, purchasing manager, etc. This session will focus on the project foreman’s role and responsibilities in project planning and the three stages of planning; 1) Information Turnover, 2) Preconstruction Planning, and 3) Short Interval Planning.
- **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.

Continued on next page

FOREMAN TRAINING

- **Fundamentals of Job Cost Control (Managing Project Labor Cost):** In this session Mr. Koontz 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 foremen must learn to use their job cost control system as a primary management tool to control and cause a positive project outcome rather than simply focusing on cost documentation and cost history. Great foremen CONTROL their project cost while their average peers only tend to WATCH project cost.

Foreman Training 3 & 4

John Koontz

Fri. & Sat., October 14-15, 2022

Friday: 7:00 a.m. – 2:00 p.m.

Saturday: 7:00 a.m. – 12:00 p.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

- **Effective Project Documentation:** Documentation is a very time consuming but necessary evil in the construction process. Due to the great risk accepted when a Mechanical Contractor signs a contract, all mechanical projects must have a contemporaneously written factual record/history of all significant events, written by the people closest to the work. The key with documentation is having the right amount and the right types of documentation based upon the specific characteristics of the customer and the project. Over documenting a project wastes valuable company resources and can distract the project team from solving difficult project problems. Under documenting a project gives the project team a false sense of security and puts the company in an unnecessary position of risk if something goes terribly wrong on the project. Great project managers and foremen understand that excellent project documentation can prevent or protect your company from problem "escalation." In this session, the instructor will review all the basic project documentation types and discuss the steps necessary to plan and implement the project documentation process. The instructor will provide attendees with proven methods for successfully documenting all types of mechanical projects.
- **Time Management Skills:** The role of a project foreman is a dynamic and challenging thing to do for a living. It creates numerous time management challenges for the project foreman and causes daily chaos that must be successfully managed in a way that maintains project productivity, project profitability, and customer relationships. Improving time management ability for a project 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.
- **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.

Conflict Management: Project, Service and Office Team Strategies and Skills

Leah Gutmann

Thursday, August 18, 2022

7:00 a.m. – 11:00 a.m.

Members: Free

Non-Members: \$179



By the end of the session participants will be able use a variety of leadership skills and specific conflict resolution strategies to gain positive results and improve relationships. Leaders will be able to strategically guide themselves and their teams through conflict situations. In addition, attendees will know the benefits of shifting how they view conflict and be able to use natural conflict situations in their environment as an opportunity to build trust and better relationships with those in their sphere of influence. Attendees will practice applying strategies to a variety of real world construction and service situations. The class will also learn how to effectively deal with difficult coworkers that are often the roadblocks to successful conflict resolution.

Objectives:

Know the benefits of having happy and healthy conflict within and between teams, Understand conflict resolution choice points and understand the consequences of conflict avoidance and negative conflict, Apply conflict management skills and strategies to leverage creativity and input to achieve impactful result within service teams, project teams, and with clients, Be able to use communication and emotional intelligence skills to improve relationships and achieve goals during conflict situations.

Situational Leadership Skills

Gary Polain

Thursday, October 13, 2022

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179



In order to accomplish more with fewer resources, organizations need strong, yet flexible leaders. They require leadership principles that are understood and practiced by every member of the organization. They must have an individualized and flexible approach to developing leadership. A new type of leader is needed to inspire today's workplace. This person must be able to transform plans into action by working with individuals to ensure that their jobs are personally meaningful and motivating. He or she must model and coach the expected behaviors and be in charge of catching people doing things right. The new frontline leader is different from the command-and-control leader of the past. People are not interested in working for someone who just gives orders daily and conducts evaluations annually. Employees today are looking for leaders that will coach them by providing either direction or support (or both) as they attain their goals. The primary focus of this training program, is centered on understanding what the Four Basic Leadership Styles look like & when to best use them ... allowing participants to effectively work with their people on the Leadership process.

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.



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

OSHA Online 10-Hour Safety & Health *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 OSHA 10 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? 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](https://www.clicksafety.com), please contact CPMCA or the A & J for more information. CPMCA processes enrollment for contractor members' staff personnel while the Apprentice & Journeymen 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 actively, listen with intention, pause 3–5 seconds before responding, and question for clarification & paraphrase. Incorporating these 4 basic steps into your customer relations will improve your effectiveness and increase your sales with your customers

BIM 101

Dwayne Lindsey

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

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

Excel: Insert Excel Sheet into Word

Ginnie Floraday

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

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

Excel: Solver Procedure

Ginnie Floraday

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

This webcast will show you how to use the Solver function in Excel to streamline formulas in spreadsheets. Solver allows you to calculate a formula backwards. Participants will learn how to change the value of a cell that is dependent on a formula. An example of the application of this function is budgets. After setting individual projections within

each department, a department total is generated for each department. If you know that a certain department cannot exceed a certain amount, the Solver can modify the individual numbers that impact the total. All you have to do is identify what the total should be, and Solver will modify any of the related cells.

Excel: Summarizing Data with Subtotals in Excel

Ginnie Floraday

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

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

Going Green – Valuable Opportunities for Mechanical Contractors

Jeff Grossberg

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

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

Green Building: LEED Certification and Sustainable Design

Lincoln Pearce

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

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

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

Dan Bulley

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

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

Mechanical Estimating Techniques

Keith Rahn

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

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

Microsoft Office 2007 Excel

Ginnie Floraday

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

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

Microsoft Office 2007 Overview

Ginnie Floraday

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

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

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

Ginnie Floraday

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

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

PowerPoint: Introduction to PowerPoint 2007

Ginnie Floraday

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

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

Retro-Commissioning

Chris Philbrick

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

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



CPMCA

California Plumbing & Mechanical
Contractors Association

**California Plumbing & Mechanical
Contractors Association
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