



Mechanical Construction Education Alliance (MCEA)

Course Catalog July–December 2023

**Computer Skills & Technology • Foreman Training
Project Management • Leadership and Professional Development
Certified Safety – Safety Risk Control**

Contents

CPMCA Executive Committee, Board of Directors	2
Letter from the Executive Director	3
Schedule at a Glance by Month	4
Schedule at a Glance by Track	5
MCAA Events.....	6
2023 Instructors	7-9
Computer Skills/Technology	10-13
Project Management	14-17
Foreman Training.....	18-20
Leadership and Professional Development	21-23
Certified Safety – Safety Risk Control	24-25



CPMCA Executive Committee, Board of Directors

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Michelle Lynn

Director of Special Projects

Executive Director's Message

CPMCA's **Mechanical Construction Education Alliance (MCEA)** is proud to present our membership with the 20th semi-annual course catalog. Our extensive range of first-in-class instructors and educational offerings has gained significant momentum throughout the years. It's a true accomplishment and rewarding to see our training room consistently filled to capacity with new and familiar faces.



Our education program reflects our extensive reach and partnership with other trade associations. We strive to thoughtfully structure our classes to meet your needs while also addressing the industry's most relevant and current topics.

MCEA training hopes to provide signatory member contractors a consistent repetitive training initiative to enhance your specific company's training program. We encourage all to take advantage of these highly sought-after course offerings and please enroll early as many classes fill up quickly. We hope you find the July - December course selections relevant and valuable in both your personal and professional growth.

We look forward to seeing you all in class!

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 2023.

July

- 14 Financial Management for the Mechanical Contractor

August

- 10 Labor Cost – Convert Your Biggest Risk to Your Biggest Advantage and Improving Cash Flow and Inequitable Payment Practices
- 17 How to Get the Most Out of Your Team When Human Motivation and Causes of Dysfunction are Understood
- 22-23 Project Management 1 & 2*
- 25-26 Foreman Training 1 & 2*

September

- 7 Bluebeam BEGINNER*
- 13 Providing Professional Customer Service
- 15-16 Foreman Training 3 & 4*
- 21 Bluebeam INTERMEDIATE*
- 22 Change Order Bootcamp

October

- 5 Advanced Negotiation Strategies and the Art of Bidding
- 10-11 Project Management 3 & 4*
- 13-14 Foreman Training 5 & 6*
- 19 Bluebeam ADVANCED*
- 26 Microsoft Excel 2019 – Part 1*

November

- 16 Microsoft Excel 2019 – Part 2*
- 28-29 Project Management 5 & 6*
- 30 HR Essentials

December

- 7 Microsoft Excel 2019 – Part 3*

***These classes are VIRTUAL classes.**

Journeyman Upgrade Training

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 jessica@cpmca.org.



Los Angeles view from the CPMCA Training Facility

Computer Skills & Technology

- Bluebeam BEGINNER
Thursday, September 7, 2023
- Bluebeam INTERMEDIATE
Thursday, September 21, 2023
- Bluebeam ADVANCED
Thursday, October 19, 2023
- Microsoft Excel 2019 – Part 1
Thursday, October 26, 2023
- Microsoft Excel 2019 – Part 2
Thursday, November 16, 2023
- Microsoft Excel 2019 – Part 3
Thursday, December 7, 2023

Foreman Training

- Foreman Training 1 & 2
Fri. & Sat., August 25-26, 2023
- Foreman Training 3 & 4
Fri. & Sat., September 15-16, 2023
- Foreman Training 5 & 6
Fri. & Sat., October 13-14, 2023

Project Management

- Project Management 1 & 2
Tue. & Wed., August 22-23, 2023
- Project Management 3 & 4
Tue. & Wed., October 10-11, 2023
- Project Management 5 & 6
Tue. & Wed., November 28-29, 2023
- Change Order Bootcamp
Friday, September 22, 2023

Leadership and Professional Development

- Financial Management for Mechanical Contractors
Friday, July 14, 2023
- Labor Cost – Convert Your Biggest Risk to Your Biggest Advantage and Improving Cash Flow and Inequitable Payment Practices
Thursday, August 10, 2023
- How To Get the Most Out of Your Team When Human Motivation and Causes of Dysfunction are Understood
Thursday, August 17, 2023
- Providing Professional Customer Service
Wednesday, September 13, 2023
- Advanced Negotiation Strategies and the Art of Bidding
Thursday, October 5, 2023
- HR Essentials
Thursday, November 30, 2023



Industry professionals training at the CPMCA Facility in downtown Los Angeles

IMPORTANT EVENTS



Plan Accordingly! Take note of these important MCAA Events:

2023 AEC Best Practices Conference – Carlsbad, CA	July 30 – August 2, 2023
Field Leaders Conference – San Francisco, CA	August 2-4, 2023
2023 Fabrication Conference – Seattle, WA	September 11-13, 2023
IPM 85 Class, Week 2 – Austin, TX	September 17-21, 2023
IPM 86 Class, Week 2 – Austin, TX	September 18-22, 2023
2023 Collective Bargaining Seminar – Las Vegas, NV	September 25-27, 2023
2023 UA/MCAA Labor Relations Conference – Las Vegas, NV	September 27-28, 2023
MCAA 2023 Great Futures Forum – Milwaukee, WI	September 28-30, 2023
ALI Course 23, Week 1 – Chapel Hill, NC	October 1-4, 2023
Field Leaders Conference – Des Moines, IA	October 11-13, 2023
IPM 87 Class, Week 1 – Austin, TX	October 15-19, 2023
IPM 88 Class, Week 1 – Austin, TX	October 16-20, 2023
2023 Industry Funds Conference – Longboat Key, Florida	November 28-30, 2023

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 Teresa Pezzi at tpezzi@mcaa.org





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 America 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).



For over 30 years **Kevin L. Dougherty** has been speaking to the construction industry. Kevin represents a changing industry—aggressive, realistic, and open-minded. Kevin's work and education experience enables him to relate to today's problems and provides tangible solutions in an easy-to-listen style. He has taught thousands of people in various seminars. His client base ranges from family-owned businesses to corporate conglomerates. In addition to speaking and writing articles, Kevin has served as, foreman, journeyman, sales manager, project manager, corporate trainer, partner for a multimillion-dollar specialty services contractor. Kevin has also been a frequent speaker for various organizations including SMACNA, MCAA, MSCA, NECA, NFPC, SMART, U.A. PHCC, ISA, SBA, and other trade associations.

Kevin's ability to entertain audiences and hold their interest while getting his message across consistently makes him one of the industries top speaking and training talents.



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.

2023 INSTRUCTORS



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 its 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.



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.



Dr. Blake Wentz has a bachelor's degree in finance and a master's degree in engineering from the University of Nebraska, and a PhD from Indiana State University. He owned and operated his family's mechanical contracting business, Wentz Plumbing and Heating, in Lincoln, NE for five years before becoming a college professor, completing various projects throughout Nebraska, Iowa and Kansas.

Dr. Wentz was the faculty advisor for the Mechanical Contractors Association of America (MCAA) Student Chapter at MSOE, whose competition teams have qualified for the National Finals nine times, winning the National Title in 2011, 2013 and 2019. He was named National Educator of the Year for the MCAA in 2011, 2012, 2015 and 2018. Dr. Wentz currently serves as the President of the Associated Schools of Construction, an international organization of over 160 universities across the world that focus on the advancement of construction education. He is also involved in consulting activities and has been an expert witness for construction legal disputes and is a co-author of a textbook titled "Construction Law for Design Professionals, Construction Managers and Contractors."



Dianne Young is a highly accomplished educator, facilitator, and business consultant with a passion for helping others succeed. With a track record of creating more than a dozen successful companies, she is a true ideas person who takes action and achieves results. Dianne's extensive experience in business consulting and training has allowed her to work with organizations of all sizes and industries, helping them strategically exceed their goals using existing resources. Her ability to bring out the best in others and help them realize their true potential is unparalleled. As a former educator with Dale Carnegie Training, Dianne has trained thousands of business professionals from all walks of life, developing their skills and confidence to achieve their personal and career goals. Her clientele includes major corporations such as Microsoft, Mazda, State Farm, National Security Association, AT&T, CDC, Department of Defense, Equifax, United Way, Atlanta Public Schools, Bank of America, Association of Home Builders and many more. Dianne's expertise in the art of educating, encouraging, and empowering her audiences has led her to be featured as a keynote speaker for numerous conferences, including the Woman's Leadership Conference and National Women in Business. Her passion for learning and avid reading also contribute to her ability to inspire and motivate others.

COMPUTER SKILLS/TECHNOLOGY

Bluebeam – BEGINNER

Location: **VIRTUAL**

Christopher Suggs

Thursday, September 7, 2023

7:00 a.m. – 2:30 p.m.

Member: Free

Non-Member: \$299



PLEASE NOTE: Instructor will be using Revu 21. To follow along, please make sure you have any of the following versions of Bluebeam:

Revu 20 (Standard, CAD, eXtreme)

Revu 21 (Core, Complete)

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

Bluebeam – INTERMEDIATE

Location: **VIRTUAL**

Christopher Suggs

Thursday, September 21, 2023

7:00 a.m. – 2:30 p.m.

Member: Free

Non-Member: \$299



PLEASE NOTE: Instructor will be using Revu 21. To follow along, please make sure you have any of the following versions of Bluebeam:

Revu 20 (Standard, CAD, eXtreme)

Revu 21 (Core, Complete)

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

Location: **VIRTUAL**

Christopher Suggs

Thursday, October 19, 2023

7:00 a.m. – 2:30 p.m.

Member: Free

Non-Member: \$299



PLEASE NOTE: Instructor will be using Revu 21. To follow along, please make sure you have any of the following versions of Bluebeam:

Revu 20 (eXtreme)

Revu 21 (Complete)

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



COMPUTER SKILLS/TECHNOLOGY

CONTINUED

Microsoft Excel 2019 – Part 1

Location: **VIRTUAL**

New Horizons Computer Learning Center

Thursday, October 26, 2023

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

Location: **VIRTUAL**

New Horizons Computer Learning Center

Thursday, November 16, 2023

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

Location: **VIRTUAL**
New Horizons Computer Learning Center
Thursday, December 7, 2023
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.



PROJECT MANAGEMENT

Project Management 1 & 2

Location: **VIRTUAL**

John Koontz

Tue. & Wed., August 22-23, 2023

Day 1: 6:30 a.m. – 10:00 a.m.

Day 2: 6:30 a.m. – 8:00 a.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

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



Project Management 3 & 4

Location: **VIRTUAL**

John Koontz

Tue. & Wed., October 10-11, 2023

Day 1: 6:30 a.m. – 10:00 a.m.

Day 2: 6:30 a.m. – 8:00 a.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

- **Fundamentals of Job Cost Control (MANAGING PROJECT LABOR COST):** In this session the instructor will help attendees to gain an understanding of the job cost control and labor cost trending methods as detailed in the Job Cost Control section of the MCAA Project Manager's Manual. All project managers must learn to use their job cost control system as a primary management tool to control and cause a positive project outcome rather than simply focusing on cost documentation and cost history. Great project managers CONTROL their project cost while their average peers only tend to WATCH project cost. This "basic" session is geared to new or potential project managers with minimal experience in job cost control systems and procedures and as a great refresher to more experienced project managers.
- **Project Billings and Maintaining Positive Cash Flow:** Maintaining positive cash flow is one of the mechanical contractor's greatest challenges. The construction industry's standard billing and payment model is a formula that has the potential to create poor cash flow on almost every project. This session focuses on how the project manager, through planning, creativity, excellent project execution, and positive customer relationships can regularly create positive project cash flow on most projects.
- **Essential Management Skills:** Learn the unique, basic management skills required to be a successful mechanical project manager. The primary focus of this session is "People Management". Gain an understanding of the essential traits, skills, and behaviors that allow effective management.



PROJECT MANAGEMENT

CONTINUED

Project Management 5 & 6

Location: **VIRTUAL**

John Koontz

Tue. & Wed., November 28-29, 2023

Day 1: 6:30 a.m. – 10:00 a.m.

Day 2: 6:30 a.m. – 8:00 a.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

- **Contracts:** Using the Contract as a Tool for Project Management: Gain a basic understanding of contract types and components, and learn how to use the contract to maximize profitability while managing a mechanical construction project. Learn skills to help you know what the contract says and how to organize and manage the project accordingly.
- **Effective Project Documentation:** Documentation is a very time consuming but necessary evil in the construction process. Due to the great risk accepted when a Mechanical Contractor signs a contract, all mechanical projects must have a contemporaneously written factual record/history of all significant events, written by the people closest to the work. The key with documentation is having the right amount and the right types of documentation based upon the specific characteristics of the customer and the project. Over documenting a project wastes valuable company resources and can distract the project team from solving difficult project problems. Under documenting a project gives the project team a false sense of security and puts the company in an unnecessary position of risk if something goes terribly wrong on the project. Great project managers and foremen understand that excellent project documentation can prevent or protect your company from problem "escalation." In this session, the instructor will review all the basic project documentation types and discuss the steps necessary to plan and implement the project documentation process.

Let's Connect!



Follow Us

Change Order Bootcamp

Location: CPMCA Training Room

Troy Aichele

Friday, September 22, 2023

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

This workshop is a must for all Project Managers, Assistant Project Managers and Estimators looking to learn and enhance their construction change order knowledge in the mechanical industry.

Participants will learn the following from this workshop:

- The different types of changes that occur on a project
- Change Order management methods, SOP's (Standard Operating Procedures) and Documentation
- Change Order risk management and notification strategies
- Change Order pricing methods (Lump Sum, T&M, and Forward Pricing)
- Types of Change Order impacts and productivity correction factors
- Sequential steps and best practices in identifying, pricing and selling Change Orders
- How to calculate Overtime and Shift Work Change Orders

CPMCA NEWSLETTER



**SIGN UP TO FEATURE YOUR
PROJECTS & MEMBER SPOTLIGHTS**

FOREMAN TRAINING

Foreman Training 1 & 2

Location: **VIRTUAL**

John Koontz

Fri. & Sat., August 25-26, 2023

Day 1: 6:30 a.m. – 10:00 a.m.

Day 2: 7:00 a.m. – 8:30 a.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

- **Planning Skills for the Project Team:** All great project 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. 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. In this session, the instructor will provide proven methods and practices for creating, controlling, and improving project productivity on all types of projects.
- **Fundamentals of Job Cost Control (Managing Project Labor Cost):** In this session the instructor will help attendees to gain an understanding of the job cost control and labor cost trending methods as detailed in the Job Cost Control section of the MCAA Project Manager's Manual. All 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.



Foreman Training 3 & 4

Location: **VIRTUAL**

John Koontz

Fri. & Sat., September 15-16, 2023

Day 1: 6:30 a.m. – 10:00 a.m.

Day 2: 7:00 a.m. – 8:30 a.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.

FOREMAN TRAINING

CONTINUED

Foreman Training 5 & 6

Location: **VIRTUAL**

John Koontz

Fri. & Sat., October 13-14, 2023

Day 1: 6:30 a.m. – 10:00 a.m.

Day 2: 7:00 a.m. – 8:30 a.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

- **Essential Management Skills:** Learn the most important management skills utilized and mastered by all great managers. The primary focus of this session is "People Management". Gain an understanding of the essential traits, skills, and behaviors that allow effective management.
- **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 and foreman can implement to improve end-of-job performance and mitigate the difficulties of project closeout.
- **Best Practices of Industry's Best Foremen:** Why are some foremen 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 foreman's success, the instructor has identified, and will share, the best practices and skills that can be learned by any foreman 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 foremen. It also provides a review of the traits and qualities that are the common denominators among excellent project foremen.



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Financial Management for Mechanical Contractors

Location: CPMCA Training Room

Leah Gutmann

Friday, July 14, 2023

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179



This course is a must for all mechanical contractor employees. Participants will actively explore the financial drivers of the mechanical contracting industry. This workshop focusses on both service and construction fundamentals. Attendees will learn how work at the ground level impacts upstream financial reports and the company's ability to implement identified strategies for growth and performance. The group will work on identifying and calculating revenues and margins at all levels of the organization. A portion of the workshop will be spent working with each other discovering how everyone in the organization has an impact on overall company performance.

Objectives:

- Analyze the financial difference between construction and service businesses.
- Know how to calculate earned revenue for both construction and service sides of the business.
- Identify key project indicators and manage impacts to the project and company financials.
- Understand why key financial indicators matter and how project and service performance directly impacts inward and outward facing reports.
- Know how project and service performance impacts key financial statements and the company's ability to manage growth and recession.
- Know how companies achieve long term financial stability by aligning company goals and long-term financial strategies.

Labor Cost – Convert Your Biggest Risk to Your Biggest Advantage and Improving Cash Flow and Inequitable Payment Practices

Location: CPMCA Training Room

Stephane McShane

Thursday, August 10, 2023

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179



Case studies demonstrate common myths of field productivity due to a fundamental misunderstanding of what productivity really is. Case studies provide step by step illustration for participants to simply and clearly define productivity and production. Case studies illustrate methodologies for measuring and managing jobsite productivity for sustainable, breakthrough performance gains.

Cash flow is one of the most important issues facing contractors today. Companies are faced with starting new projects, hiring staff, and investing in assets to support the business. More companies go bankrupt due to cash flow issues than due to profitability. Many things can and should be done to improve cash

LEADERSHIP AND PROFESSIONAL DEVELOPMENT

CONTINUED

management practices. Practical tools and strategies to improve cash flow will be discussed. In most cases, they are improvements to existing practices that can be quickly implemented to put a focus on cash flow and drive the right organizational behaviors. This presentation will also quantify the impact of slow payment and identifies mitigation strategies to address inequitable payment practices.

Following this course, participants will be able to:

- Clearly define and appropriately measure productivity
- Clearly define and understand the mechanics of production
- Gain an introductory understanding, based on case studies, of how to measure cost of lost production and how to implement effective improvement routines
- Increase profits with better billings and collections practices
- Apply tools and techniques that optimize cash flow
- Maximize cash flow with process standardization
- Create transparency and accountability with measurement
- Quantify the impact of slow payment
- Specific, tangible things specialty contractors can do to improve payment cycles
- Jurisprudence surrounding contract language and enforceability
- Negotiating points with general contractors and owners

How to Get the Most Out of Your Team When Human Motivation and Causes of Dysfunction are Understood

Location: CPMCA Training Room

Dr. Blake Wentz

Thursday, August 17, 2023

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179



How do you develop and maintain a motivated workforce? It may not be the way that you think, as many try to drive human behavior with the "carrot and the stick" approach, but research shows that is not a long-term solution. This course will review the various theories of motivation and discuss the intrinsic rewards that truly motivate people in the workplace as well as strategies construction firms can use to build an outstanding culture. Highly efficient teams in the construction world are hard to come by. What causes a team to lose focus, decrease productivity, and function inefficiently? This session will also review the factors that can cause a team to be dysfunctional and present tools on how to rebuild your teams so they can be the best they can be.

Providing Professional Customer Service

Location: CPMCA Training Room

Kevin Dougherty

Wednesday, September 13, 2023

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179



To each employee, this dynamic and effective program will communicate the need to be more company-minded and sales-oriented. Practical, proven, and entertaining, this program's comprehensive approach to customer service makes this program mandatory for anyone who has contact with customers, including service technicians, drivers, dispatchers, foremen, receptionists, salespeople, accounting personnel, and managers.

Advanced Negotiation Strategies and the Art of Bidding

Location: CPMCA Training Room

Keith Rahn

Thursday, October 5, 2023

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179



The ability to properly negotiate in the mechanical construction industry is imperative. Everyday your company negotiates with owners, design professionals, subcontractors, jurisdictional authorities and vendors for various reasons; such as, new contracts, change orders, value engineering, design issues and project buyout. The course will review the various methods / techniques, importance of proper communication, and examine the importance of your company's and individual philosophy towards negotiations. How we are perceived or actually treat people can have a powerful influence on our affectedness to negotiate. Participants will have an opportunity to participate in situational case studies, which will simulate various mechanical construction negotiation topics. Also learn how to increase your share of profitable work and decrease the chance of being the low bidder on unprofitable jobs.

HR Essentials

Location: CPMCA Training Room

Dianne Young

Thursday, November 30, 2023

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179



This course serves as a beginner's guide to the latest HR trends in the workplace. It aims to equip learners with a comprehensive understanding of HR practices in contemporary organizations and is designed for individuals who seek fundamental knowledge of HR systems, regulations, and developments. Participants will analyze and explore the necessary prerequisites associated with employment and labor laws, and learn practical strategies for implementing and enforcing them.

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 not completed within 6 months)

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 two 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 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.





Let's Connect!

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