



Mechanical Construction Education Alliance (MCEA)

Training Catalog

August – December 2024

Computer Skills & Technology | Combination Training: Foreman & Project Managers
Foreman Training | Leadership, Safety and Professional Development Skills
Project Engineering | Project Management | Service
Certified Safety – Safety Risk Controls



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CPMCA Executive Committee, Board of Directors

Executive Committee – 2023/2024

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Director of Education

Executive Director's Message

CPMCA's **Mechanical Construction Education Alliance (MCEA)** is proud to present its membership with the 22nd 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 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 August – December course selections relevant and valuable in both your personal and professional growth.

We look forward to seeing you 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

August

- 1 Bluebeam for Administrative Professionals*
- 15 Artificial Intelligence in Mechanical Contracting
- 21 Fabrication, Shop Drawings & BIM Process
- 22 Change Order Bootcamp
- 23-24 Foreman Training 1 & 2
- 29 Field Based Project Management: Closing the Gap Between the Office and the Field

September

- 11 Introduction to California Construction Contracts
- 19 Bluebeam BEGINNER*
- 20-21 Foreman Training 3 & 4
- 25 The Foreman's Impact on Profitability and High Impact Leadership
- 26 360° Effective Presenting

October

- 2 The Service Team and Beyond: Conflict Management and Keys to Communication
- 10 Bluebeam INTERMEDIATE*
- 18-19 Foreman Training 5 & 6
- 24 Bluebeam ADVANCED*
- 25 Leading a Multi-Generational Workforce

November

- 7 Microsoft Excel 2019 – Part 1*
- 8 Effective Time Management
- 14 De-escalation Skills and Surviving an Active Shooter
- 15 Leadership for Engineers in Construction
- 20 Understanding Mechanical Systems
- 21 Microsoft Excel 2019 – Part 2*

December

- 5 Microsoft Excel 2019 – Part 3*
- 10 Cash Flow: Managing the Lifeblood of Contracting & Cracking the 'WIP'

*** Virtual Training**

Journeyman Upgrade Training

All CPMCA trainings listed in this course guide are approved and will count toward the Journeyman Upgrade Training Requirement. Please take advantage of these valuable opportunities. CPMCA registers non-union/office staff. A&J registers DC16 Union Members. Visit www.ajtraining.org for more information.

How to Register for CPMCA Trainings

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 trainings for which registration is open. Click on "More Details" and then "Website" to view specific information about the training and/or to register online.
- 2) Online invitations are emailed a month before each training date. The invitation will contain specific information about the training (time, location, parking directions, speaker bio) as well as links to register online. If you are not on the email distribution list, please email Michelle@cpmca.org.



Computer Skills and Technology

- Bluebeam for Administrative Professionals
Thursday, August 1, 2024
- Artificial Intelligence in Mechanical Contracting
Thursday, August 15, 2024
- Bluebeam BEGINNER
Thursday, September 19, 2024
- Bluebeam INTERMEDIATE
Thursday, October 10, 2024
- Bluebeam ADVANCED
Thursday, October 24, 2024
- Microsoft Excel 2019 – Part 1
Thursday, November 7, 2024
- Microsoft Excel 2019 – Part 2
Thursday, November 21, 2024
- Microsoft Excel 2019 – Part 3
Thursday, December 5, 2024

Combination Training: Foreman and Project Managers

- Field Based Project Management: Closing the Gap Between the Office and the Field
Thursday, August 29, 2024

Foreman Training

- Foreman Training 1 & 2
Fri. & Sat., August 23-24, 2024
- Foreman Training 3 & 4
Fri. & Sat., September 20-21, 2024
- The Foreman's Impact on Profitability and High Impact Leadership
Wednesday, September 25, 2024
- Foreman Training 5 & 6
Fri. & Sat., October 18-19, 2024

Leadership, Safety and Professional Development Skills

- 360° Effective Presenting
Thursday, September 26, 2024
- Leading a Multi-Generational Workforce
Friday, October 25, 2024
- Effective Time Management
Friday, November 8, 2024
- De-escalation Skills and Surviving an Active Shooter
Thursday, November 14, 2024

Project Engineering

- Leadership for Engineers in Construction
Friday, November 15, 2024

Project Management

- Fabrication, Shop Drawings & BIM Process
Wednesday, August 21, 2024
- Change Order Bootcamp
Thursday, August 22, 2024
- Introduction to California Construction Contracts
Wednesday, September 11, 2024
- Cash Flow: Managing the Lifeblood of Contracting & Cracking the 'WIP'
Tuesday, December 10, 2024

Service

- The Service Team and Beyond: Conflict Management and Keys to Communication
Wednesday, October 2, 2024
- Understanding Mechanical Systems
Wednesday, November 20, 2024



IMPORTANT EVENTS



Plan Accordingly! Take note of these important MCAA Events:

IPM Class 89, Week 2 – Austin, TX	September 21 – 26, 2024
IPM Class 90, Week 2 – Austin, TX	September 22 – 27, 2024
MCAA GreatFutures Forum – Seattle, WA	September 26 – 28, 2024
ALI Course 24, Week 1 – Chapel Hill, NC	September 29 – October 2, 2024
IPM Class 91, Week 1 – Austin, TX	October 6 – 10, 2024
IPM Class 92, Week 1 – Austin, TX	October 7 – 11, 2024
ALI Course 24, Week 2 – Chapel Hill, NC	November 3 – 7, 2024
Field Leaders Conference – Atlanta, GA	November 11 – 13, 2024
Industry Funds Conference – Longboat Key, FL	December 4 – 6, 2024

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 conferences, 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).

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.

Harry Bederian first became interested in the mechanical contracting industry when he was an undergraduate student at California State Polytechnic University, Pomona (Cal Poly Pomona) and served as the president of the MCAA/CPMCA Student Chapter at Cal Poly Pomona. He majored in Mechanical Engineering with an emphasis in Manufacturing and obtained a minor in Business. After graduating, Harry began his career in the HVAC construction industry before transitioning two years later to the industrial construction industry. Throughout his career, he has held various positions, including but not limited to, Project Manager, Sr. Project Engineer, and Estimator. In addition, Harry developed and oversees the Summer Internship Program, provides mentorship and coaching and helps everyone around him become better at what they do. He has worked on diverse projects, including the construction of Gas Fired Power Plants, Solar Power Plants, and Gas Compressor Stations, as well as refinery construction.

Carol Cambridge is CEO of The Stay Safe Project, an international conference speaker & workplace violence expert. Highly profiled for her expertise, she is often sought by the media for comments when tragedies occur. Carol has been interviewed by: ABC, NBC, USA Today, CBC and as far away as News Channel Asia in Singapore.

As a thought leader, she wants people to move away from Fear Based Thinking, which is limiting, paralyzing and just plain negative! Instead, Carol shows people how to navigate fear & use their critical thinking skills to guide them through an emergency or a crisis. Her career began as a communications specialist in emergency services and disaster preparedness with a Canadian Law Enforcement Agency.



2024 INSTRUCTORS

Chris Carr's company has been closely observing the rise of artificial intelligence and its potential to reshape the business landscape. Through years of analysis, workshops, and hands-on experience, Chris has come to one conclusion: many companies stand on the brink of a transformative era without the tools to navigate it. His seminars are a call to action for businesses to wake up to the reality of AI and equip themselves for the future that's already here. Chris has earned a certification in Generative AI for Business Transformation from MIT and is currently completing his certification in AI for Business at the Wharton School of Business.

Kevin L. Dougherty has been speaking to the construction industry for over 30 years. Kevin represents a changing industry—aggressive, realistic, and open-minded. Kevin's work and education experience enables him to relate to today's problems and provides tangible solutions in an easy-to-listen style. He has taught thousands of people in various seminars. His client base ranges from family-owned businesses to corporate conglomerates. In addition to speaking and writing articles, Kevin has served as, 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.

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.

Eric Herdman is an accomplished speaker, business leader, and facilitator, who has been speaking professionally in-person for almost 3 decades. During his training sessions Eric will entertain, inform, educate, and engage audiences into action. Eric delivers more than just a seminar; you get an educational training experience. He attended Ohio State University as an Exercise Physiology major. Eric started speaking professionally in 1996, and draws on his experiences as a small business owner and competitive athlete to help others learn and grow. He works with a variety of clients from multibillion-dollar pharmaceutical companies to top financial institutions to national associations and government agencies. Eric has published several e-books including "Time, Energy, and Focus", featuring a technique he created to improve productivity, and "The Power of Communication", both currently available on-line.

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.

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.

Mark Rogers is the President of West Chester Mechanical Contractors, an HVAC, service and plumbing contractor that serves the Philadelphia, PA area. The company was named Plumbing & Mechanical's 2017 Mechanical Contractor of the Year. Mark started out as a steamfitter in Philadelphia, then started West Chester Mechanical in 1996. The company specializes in private commercial work in the healthcare and educational arenas. The company is built on repeat business with a strong emphasis on a family atmosphere and outstanding customer service. When Mark started the company, he immediately got involved with MCAA, serving on a number of task forces that developed education programs.

Christopher Suggs' passion has been re-fabrication with Revit 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.

Theresa Crawford Tate is the managing partner of the legal firm Crawford & Bangs. Her areas of practice include construction law, contracts, corporate and business law. Crawford & Bangs is a boutique construction law firm that specializes in representing entities involved in the construction industry at all levels. The firm was founded in 1979 by Ms. Tate's father, William Crawford.

Ms. Tate graduated with honors from both the California State University at Fullerton and Loyola Law School, Los Angeles (Order of the Coif). Ms. Tate is admitted to practice before all the state courts of California, the U.S. District Courts for the Central, Southern, and Eastern Districts, and the United States Court of Appeals for the Ninth Circuit. She is a member of the State Bar of California and Los Angeles County Bar Association. Further, Ms. Tate is a frequent author and speaker on construction related topics. Her articles are posted on the Crawford & Bangs website at www.BuildersLaw.com.

COMPUTER SKILLS AND TECHNOLOGY

Bluebeam for Administrative Professionals

VIRTUAL

Christopher Suggs

Thursday, August 1, 2024

8:00 a.m. – 12:00 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 is geared toward the administrative office professional. The prerequisite for this 4-hour training is basic understanding of Bluebeam.

From managing ever-changing document sets to contracts and beyond, Bluebeam is great for administrative professionals, too!

- Add/remove/replace pages from documents
- Use redaction to hide sensitive information from documents quickly
- Create and apply digital signatures
- Update Page Labels
- Applying headers and footers
- Search document text and visual symbols
- Create and apply stamps
- Flag important content in documents

Artificial Intelligence in Mechanical Contracting: How to Leverage AI to Improve Efficiency and Maximize Profitability

IN-PERSON TRAINING

Chris Carr

Thursday, August 15, 2024

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$299



In this training, Chris Carr will delve into the evolving landscape of Artificial Intelligence (AI) – its current state, future directions, and the readiness strategies for mechanical contracting companies. He will explore the transformative nature of AI in the mechanical contracting industry, discussing its potential to revolutionize efficiency and productivity through the use of large language models. This session aims to demystify the process of engaging with data in a meaningful way, highlighting AI's significant impact on marketing, advertising, and operational strategies. Furthermore, he provides practical steps that mechanical contracting organizations can implement to stay at the forefront of innovation, ensuring they are well-equipped to navigate the disruptions AI is poised to introduce.

Bluebeam – BEGINNER

VIRTUAL

Christopher Suggs

Thursday, September 19, 2024

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

VIRTUAL

Christopher Suggs

Thursday, October 10, 2024

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

COMPUTER SKILLS AND TECHNOLOGY

CONTINUED

Bluebeam – ADVANCED

VIRTUAL

Christopher Suggs

Thursday, October 24, 2024

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 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

Microsoft Excel 2019 – Part 1

VIRTUAL

New Horizons Computer Learning Center

Thursday, November 7, 2024

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

VIRTUAL

New Horizons Computer Learning Center

Thursday, November 21, 2024

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

VIRTUAL

New Horizons Computer Learning Center

Thursday, December 5, 2024

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.

COMBINATION TRAINING: FOREMAN & PROJECT MANAGERS

Field Based Project Management: Closing the Gap Between the Office and the Field

IN-PERSON TRAINING

Kevin Dougherty

Thursday, August 29, 2024

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179



Simple things such as better planning, leadership, material handling, negotiations, conflict resolution, accountability, communication, time management, documentation, and people skills can and will impact the job. Are you setting your people up for success? "Field Based Project Management" is designed to get the field to understand the importance of the project management process, and provide them with the tools to improve and insure profitability goals are met. This program will touch on preplanning, job coordination, and dealing with the other job trades, the need for jobsite organization, jobsite negotiations and many more real world topics.



Foreman Training 1 & 2

IN-PERSON TRAINING

John Koontz

Fri. & Sat., August 23-24, 2024

Day 1: 7:00 a.m. – 2 p.m.

Day 2: 7:00 a.m. – 11:00 a.m.

Member: \$100

Non-Member: \$179



This two-day course will cover the following topics:

- **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

IN-PERSON TRAINING

John Koontz

Fri. & Sat., September 20-21, 2024

Day 1: 7:00 a.m. – 2 p.m.

Day 2: 7:00 a.m. – 11:00 a.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

- **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 5 & 6

IN-PERSON TRAINING

John Koontz

Fri. & Sat., October 18-19, 2024

Day 1: 7:00 a.m. – 2 p.m.

Day 2: 7:00 a.m. – 11:00 a.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

- **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.

The Foreman's Impact on Profitability and High Impact Leadership

IN-PERSON TRAINING

Mark Rogers

Wednesday, September 25, 2024

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179



The first part of this session will focus on the foreman's impact on profitability. You will learn how you and your team impact the company's profitability and ability to compete for more manhours in today's marketplace. This session is for anyone who is currently in a leadership role on the jobsite or who has aspirations to be. Foremen, Journey workers, later year apprentices or anyone who is part of a project will be shown how their interactions with coworkers, other tradespeople and the end users can help (or hurt) the direct cost of union tradespeople. This session will show how they and their decisions impact safety, insurance, profits and overall company culture at every level of a project.

The second part of this session will focus on high impact leadership. From planning in the office to execution in the field, a collaborative culture within your company is essential to the success of every project. Often communication is poor, finger pointing occurs and frustrations are expressed between project managers, detailing departments (VDC) and field leaders, all of which negatively impact the job. All departments have their own unique challenges that can be overcome by a team effort. It's time for blaming to end and leadership to begin. This session is designed to bring out the inner leader in all attendees. Regardless of your job title or company role, we all have the opportunity to be a leader. You never know who is watching and you never know when your leadership skills will leave an impact. By the conclusion of this session, attendees will understand what it truly means to be a leader and how to implement leadership skills in their daily personal and professional lives.

LEADERSHIP, SAFETY AND PROFESSIONAL DEVELOPMENT SKILLS

360° Effective Presenting

IN-PERSON TRAINING

David Ashcraft

Thursday, September 26, 2024

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179



Learn how to turn 1-sided lectures into 3-demsional engaging conversations. If your role includes making internal, external, or virtual presentations, it is vital to use a repeatable process to quickly build rapport and trust to engage with your audience. In addition to a process, having a solid plan that prepares you for any unexpected challenges during your presentation will help those with public speaking anxiety. Your instructor: David Ashcraft, has provided tips and techniques to thousands of individuals from around the world to make their messages more memorable. People often focus on the content so much they forget to connect the content to their audience. Learn time-tested techniques to deliver more engaging, inspiring, and entertaining communication to an audience of one, your team, or larger audiences. Whether you're new to the game or a seasoned professional, this class delivers applicable tips that will benefit you today and for years to come.

The objective of this training is to increase the presentation skills of your team when educating, informing, and influencing any audience.

In this highly interactive class, you will learn the following:

1. Proven approaches to get your presentation off the ground and to land it effectively
2. The path to Powerful Presenting
3. How to tell a better story. "Pictures are worth a thousand words, stories are worth a thousand pictures"
4. Techniques to utilize PowerPoint and/or whiteboard to engage the audience and make your message more memorable
5. Distracting appearance and auditory behaviors and how to reduce them
6. Techniques to connect with your audience by using engaging verbal and visual techniques
7. Five things lucky people do to achieve more success



Leading a Multi-Generational Workforce

IN-PERSON TRAINING

Eric Herdman

Friday, October 25, 2024

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179



This insightful training session will help leaders and managers navigate the unique challenges and opportunities of a multi-generational workforce. As workplaces become increasingly age-diverse, understanding how to effectively lead teams comprising Baby Boomers, Gen X, Millennials, and Gen Z is more important than ever. This workshop offers a deep dive into the varying motivations, communication styles, and work ethics of different generations. Through a blend of interactive discussions, activities and expert insights, participants will learn to create a harmonious and productive work environment that leverages the strengths of each generation.

During this training, attendees will explore strategies for fostering intergenerational understanding and collaboration. It emphasizes practical techniques for bridging communication gaps, managing differing expectations, and developing a culture of mutual respect and inclusion.

Your curriculum will incorporate:

1. Understanding Generational Differences: Insights into the values, motivations, and work preferences of different generations
2. Effective Communication Strategies: Tailoring communication styles to effectively reach and engage each generation, as well as developing an understanding of the communication modalities each generation prefers
3. Bridging the Generation Gap: Techniques to foster mutual understanding & respect among diverse age groups
4. Adapting Leadership Styles: Learning to modify leadership approaches to meet the needs of a multi-generational team
5. Conflict Resolution: Strategies for resolving intergenerational conflicts in a constructive manner
6. Leveraging Diverse Perspectives: How to harness the unique strengths and experiences of each generation for team success
7. Creating an Inclusive Culture: Building a workplace environment that values and utilizes each generation's strengths
8. Motivation and Engagement: Techniques for motivating and engaging employees from different generational backgrounds
9. Mentorship and Collaboration: Encouraging cross-generational mentorship, coaching and learning opportunities
10. Managing Change: Understanding how each generation responds to change and how to manage it effectively with all of the generations

LEADERSHIP, SAFETY AND PROFESSIONAL DEVELOPMENT SKILLS CONTINUED

11. How to Groom Tomorrow's Leaders
12. Addressing Stereotypes: How to identify and overcome generational stereotypes and biases to form a blended cohesive team
13. Personalized Professional Development: Tailoring development and learning opportunities to suit the career aspirations of each generation
14. Work-Life Balance: Understanding & accommodating the varying work-life balance expectations

Effective Time Management

IN-PERSON TRAINING

David Ashcraft

Friday, November 8, 2024

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179



If you are looking for tips, tools, and techniques to improve your productivity, this is a training session worth your time. In this class, you will learn how to identify and eliminate common time management obstacles, complete common tasks more efficiently, and identify habits you could change to give you more time in your day, week, and life.

If you have trouble staying mentally on task, keep a list of to-dos in your head, and feel overwhelmed at times, it does not have to be that way. Learn how to develop a time budget, organize your inbox, improve your follow up and follow through, manage meetings, and ultimately get the most accomplished each day.

You will also learn techniques to leverage AI applications to expand creativity and expedite completion of many tasks.

Register for this class today, if you have been looking for ways to manage your time more efficiently!

Learning Objectives Include:

1. Principles of time management
2. Creating a focused schedule and workspace
3. Identifying ineffective ways to work
4. Reducing interruptions
5. Dealing with feeling overwhelmed
6. Organizing your inbox
7. Making the most of meetings
8. Following up
9. Leveraging AI to be more effective and efficient
10. Lessons that will last a lifetime

De-escalation Skills and Surviving an Active Shooter

IN-PERSON TRAINING

Carol Cambridge

Thursday, November 14, 2024

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179



Train your people now and increase employee safety and reduce corporate liability!

Construction can be a high pressure and fast-paced industry where exhaustion, stress and conflict can lead to confrontations from verbal threats to violent attacks.

When it comes to dealing with angry or frustrated employees, laborers, subs, engineers, vendors or anyone on a job site, many superintendents, foremen & leaders are not equipped to handle the urgency and the intensity of the situation.

When emotions run high and positive outcomes are critical, it's imperative that leaders develop new skills and strategies for de-escalating challenging situations.

In this presentation attendees will:

- Learn why someone goes ballistic and how to respond
- Discover 3 tips to navigate challenging conversations
- Learn the Secret Power Phrases that almost always work
- Identify the signs that an attack is imminent
- Learn the top 5 non-verbal strategies to de-escalate

In an active shooter scenario, you have only seconds to make a decision! In the midst of panic and chaos anyone can play an integral role in mitigating the impacts of an active shooter situation.

This experiential keynote will involve everyone in the audience! It will answer your questions and concerns; calm your fears; train your brain to respond and give you the information you need to make quick life-saving decisions.

Key Takeaways:

- Learn how to survive an Active Shooter Situation
- How we respond both physically & mentally in a crisis
- Discover the best methods of helping others escape

This is a MUST-SEE program that will provide you with life-saving skills! The focus is on survival not on fear.

PROJECT ENGINEERING

Leadership for Engineers in Construction

IN-PERSON TRAINING

Harry Bederian

Friday, November 15, 2024

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179



Ready for your next step of becoming a Project Manager. This seminar will help prepare you for what to expect as a project manager and how to be the best Project Manager and Leader possible. Becoming a Project Manager is not just about managing, it also requires being a leader.

During this one-day course, we will explore the difference between a Manager and a Leader, we will discuss different strategies, techniques, and lessons in management and leadership, we will understand how to Mentor, Coach and Teach those around you, and finally, we will take a deep dive into the most important tool a leader should master: Effective Communication. This seminar will lay down the foundation, give you the building blocks, and pave the pathway for you to explore the journey of project management and leadership. This seminar is best for individuals with little to no Project Management experience.

Learning Objectives Include:

- Become more influential
- Improve ability to lead projects and teams
- Identify leadership development goals specific to your needs
- Build rapport with managers and peers
- Improve team communication
- Become a mentor, coach and teacher



Managing the Fabrication, Shop Drawings & BIM Process

IN-PERSON TRAINING

Troy Aichele

Wednesday, August 21, 2024

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179



This workshop is a must for all Project Managers and Assistant Project Managers looking for a review of the entire process of Fabrication, Shop Drawings & BIM while learning best Project Management practices in optimizing efficiencies and cost control.

Participants will learn the following from this workshop:

- 1) Review the importance of Fabrication, Shop Drawings & BIM to Mechanical Contractors and Construction Projects
- 2) Learn the process and workflow in building a model and coordination with other trades
- 3) Learn the deliverables and definitions of this process (Material Bill of Materials, Installation Drawings, Spool Packages, Penetration Drawings, In-Wall Rough-In, and Trimble)
- 4) Learn Project Manager responsibilities and best management practices in:
 - Creating and managing a BIM Execution Plan
 - Tracking, documenting and defending detailing change orders
 - BIM, Coordination and Detailing contract review
 - VDC (Virtual Design & Construction) Kick-off meeting and weekly status update SCRUMS
 - Ensuring timely approved submittals (with adequate detail to allow inserting into the model)
 - Analyzing the BIM Coordination Schedule and understand its critical relationship to our deliverables and field installations
 - Maintaining accurate and easily accessible drawings, submittals and RFI's for detailers
 - Building the Material Matrix



Change Order Bootcamp

IN-PERSON TRAINING

Troy Aichele

Thursday, August 22, 2024

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

Introduction to California Construction Contracts

IN-PERSON TRAINING

Theresa Crawford Tate

Wednesday, September 11, 2024

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179



Maximize profits and minimize risks through your construction contract. Project team members have the best chance of accomplishing a successful project when the contract is formulated to your advantage. This workshop will provide an understanding of the most critical contract clauses and assist your team in developing all of the following:

- Essential tools for negotiating profitable contracts
- Comprehend lengthy and confusing legal language
- Appreciate the inherent risk in contracts
- Spot project "killer" clauses
- Identify standard form contract terms (both AIA and ConsensusDocs)
- Know the clauses that are unenforceable in California
- Preparing your bid to anticipate contract issues

Cash Flow: Managing the Lifeblood of Contracting & Cracking the 'WIP'

IN-PERSON TRAINING

Stephane McShane

Tuesday, December 10, 2024

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179



Cash flow is one of the most important issues facing contractors today. As the market continues to stay strong, 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 management practices. We will explore a range of tools and techniques, from simple to complex, that allow firms to manage and control cash flow. Examples include contractual negotiation strategies, pricing and bidding practices, development of cost and resource-loaded schedules that tie to billing activities in the schedule of values, use of 12-week cash flow forecasts, project closeout procedures, and managing the billings and collection cycle. An interactive cash flow simulation provides hands-on experience that enhances the learning outcomes.

Learning Objectives:

- Learn the importance of cash management practices
- Increase profits with billings and collections
- Apply tools and techniques that optimize cash flow
- Maximize cash flow with process standardization
- Create transparency and accountability with measurement

Many project managers lack a clear handle on how their projects are performing financially. Most commonly it is because they have not been trained on how to forecast properly. We find many contractors struggle with how to build a robust cost projection process that provides for consistency and predictability. Profit fade at 90% complete is no longer an option in today's market. Teach project managers how to properly set up job budgets, track progress and forecast accurately. Moreover, learn critical financial indicators that point to problems on projects early so they can be rectified.

Learning Objectives:

- Identify how to manage work-in-process for better profitability
- Understand the relationship between project profitability and processes (budgeting, forecasting, change control, job status reporting and WIP)
- Apply earned value reporting to projects

The Service Team and Beyond: Conflict Management and Keys to Communication

IN-PERSON TRAINING

Leah Gutmann

Wednesday, October 2, 2024

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179



During this full day program, service team members will work to improve communication with their teams as well as their clients. Great communication is the foundation of productivity, motivation, and effective customer service. The group will explore applying communication strategies in all three areas to build stronger relationships and improve results. Participants will discover the power of asking a good question and learn critical listening skills that will enable them to challenge their own situational assumptions. As a result, they will be able to make better decisions in the field and with their team. Participants will identify areas where they can hold themselves more accountable for the actions they take and the outcomes of their conversations. The group will practice solving conflict situations with clients, team members, and their extended network through practical case studies. The group will end the day learning specific strategies they can apply when having individual and team conflict conversations resulting in action-based changes in behavior and improved relationships for all parties.

Objectives

- Identify critical stakeholders and understand that they often go beyond the individual service client
- Learn to ask great questions in order to achieve great results
- Embrace conflict as an opportunity to get better results
- Improve trust skills in order to better manage conflict situations
- Implement a process to drive one-on-one conflict conversations to positive outcomes
- Become accountable for handling conflict situations



Understanding Mechanical Systems

IN-PERSON TRAINING

Keith Rahn

Wednesday, November 20, 2024

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179



This course will provide participants with a basic understanding of mechanical systems terminology, various components and simple design principles. Understanding Mechanical Systems is an excellent course for professionals new to the mechanical industry or contractors who are responsible for coordinating their work with mechanical contractors. The course will be broken into two parts. The first part of the course will cover the plumbing system. Participants will study the components and design elements of heating, ventilation and cooling systems that provide a comfortable and safe environment for the public. During both parts of this class, we will also incorporate the use of plans/specification and code issues. Plus, we will provide some "Green Building" examples in both plumbing and HVAC systems.



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 the 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.





**California Plumbing & Mechanical
Contractors Association
1735 Flight Way, Suite 204
Tustin, CA 92782**

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