



Mechanical Construction Education Alliance (MCEA)

Training Catalog January– June 2025

**Computer Skills & Technology | Estimating | Foreman Training
Leadership and Professional Development Skills
Project Management | Mental Health | Service
Certified Safety – Safety Risk Control**

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CPMCA Executive Committee, Board of Directors

Executive Committee – 2024/2025

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Pan-Pacific Mechanical

Robert Felix, Treasurer

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ACCO Engineered Systems

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CPMCA

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Monaco Mechanical

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Bryan Suttles

Suttles Plumbing & Mechanical Corporation

CPMCA Staff

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Executive Director

Denell Giustorobelo

Office Manager

Michelle Lynn

Director of Special Projects

Tiffany McGee

Director of Education

Sheva Goodarzi

Marketing Manager

Executive Director's Message

CPMCA's **Mechanical Construction Education Alliance (MCEA)** is proud to present our membership with the 23rd semi-annual course catalog. Our education program continues to thrive, thanks to our exceptional instructors and strategic partnerships with other trade associations. We are dedicated to structuring our classes thoughtfully to meet your needs while addressing the most relevant and current topics in the mechanical contracting industry.



We are proud to unveil our new state-of-the-art Training Center at our new location in Tustin, designed to provide an enhanced learning environment equipped with the latest technology and resources. This facility will serve as a hub for hands-on training and workshops, fostering collaboration and skill development among our members. We are also thrilled to announce that, in a move to support our members, all fees for our classes will now be eliminated. This initiative ensures that every member can access valuable training without financial barriers, empowering you to invest in your professional development.

We encourage you to explore the new course offerings in this guide and take advantage of these highly sought-after classes. As always, we recommend enrolling early, as many classes fill up quickly.

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.

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Letter from the Executive Director

Introducing CPMCA's Field Leadership Academy and Project Management Academy

CPMCA is excited to announce the launch of two new institutes, **The Field Leadership Academy** and **The Project Management Academy**, dedicated to cultivating the next generation of leaders in field leadership and project management!

The Field Leadership Academy is a six-part series that focuses on the essential skills for an effective foreman. This series covers project management skills for the field leader to improve productivity, labor and time management, documentation and change orders, managing people and subcontractors, negotiating and leadership skills, and project closeouts.

The Project Management Academy is an eight-part series that focuses on the fundamentals of project management in mechanical contracting. This series covers planning skills, mechanical scheduling for improved productivity and efficiency, job cost control, billing and cash flow management, managing people and subcontractors, communication and leadership skills, contracts, documentation, change order and time management, and negotiation skills.

Members who complete all classes within a series will receive a signed certificate of completion.



SCHEDULE AT A GLANCE BY MONTH

CPMCA TRAINING CATALOG
January– June 2025

January

- 9 The State of AI for Mechanical Contracting
- 10 The State of AI for Office-Based Mechanical Contractors
- 17 Discovering Your Leadership Style and Methods to Provide Effective Feedback
- 24 Achieving Work-Life Balance
- 31 Microsoft Project 2019 – Part 1 *

February

- 6 Core Leadership Skills for the Project Manager
- 7 Happiness: Owning Your 40
- 12 Leadership Skills for New Managers
- 19 Bluebeam Beginner *
- 20 Foreman Training 1 **
- 21 Project Management 1 ***
- 28 Microsoft Project 2019 – Part 2 *

March

- 7 Bluebeam Intermediate *
- 20 Project Management Impact on Financial Outcomes
- 26 Bluebeam Advanced *
- 27 Foreman Training 2 **
- 28 Project Management 2 ***

April

- 11 Delivering the Ultimate Service Experience
- 16 It's About Time
- 25 Microsoft Excel 2019 – Part 1 *
- 30 Thriving as a Contractor: Strategic Planning, Best Practices, and Deadly Sins to Avoid

May

- 7 Foreman Training 3 **
- 8 Project Management 3 ***
- 9 Microsoft Excel 2019 – Part 2 *
- 15 Contracts, Claims, and Documentation
- 21 Basic Principles and Methods of Estimating – Part 1
- 28 Microsoft Excel 2019 – Part 3 *
- 29 The Real Cost of a Manhour and High Impact Leadership

June

- 4 Basic Principles and Methods of Estimating – Part 2
- 12 People Management Workshop
- 13 Strategic Negotiation Workshop

* Virtual Training

** Field Leadership Academy

*** Project Management Academy

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. 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 Tiffany@cpmca.org.

SCHEDULE AT A GLANCE BY TRACK

Computer Skills and Technology

- The State of AI for Mechanical Contracting
Thursday, January 9, 2025
- The State of AI for Office-Based Mechanical Contractors
Friday, January 10, 2025
- Bluebeam BEGINNER
Wednesday, February 19, 2025
- Bluebeam INTERMEDIATE
Friday, March 7, 2025
- Bluebeam ADVANCED
Wednesday, March 26, 2025
- Microsoft Project 2019 – Part 1
Friday, January 31, 2025
- Microsoft Project 2019 – Part 2
Friday, February 28, 2025
- Microsoft Excel 2019 – Part 1
Friday, April 25, 2025
- Microsoft Excel 2019 – Part 2
Friday, May 9, 2025
- Microsoft Excel 2019 – Part 3
Wednesday, May 28, 2025

Estimating

- Basic Principles and Methods of Estimating – Part 1
Wednesday, May 21, 2025
- Basic Principles and Methods of Estimating – Part 2
Wednesday, June 4, 2025

Foreman Training

- Foreman Training 1
Thursday, February 20, 2025
- Foreman Training 2
Thursday, March 27, 2025
- Foreman Training 3
Wednesday, May 7, 2025
- The Real Cost of a Manhour and High Impact Leadership
Thursday, May 29, 2025

Leadership and Professional Development Skills

- Discovering Your Leadership Style and Methods to Provide Effective Feedback
Friday, January 17, 2025
- Leadership Skills for New Managers
Wednesday, February 12, 2025
- It's About Time
Wednesday, April 16, 2025
- Thriving as a Contractor: Strategic Planning, Best Practices, and Deadly Sins to Avoid
Wednesday, April 30, 2025

Project Management

- Core Leadership Skills for the Project Manager
Thursday, February 6, 2025
- Project Management 1
Friday, February 21, 2025
- Project Management 2
Friday, March 28, 2025
- Project Management 3
Thursday, May 8, 2025
- Project Management Impact on Financial Outcomes
Thursday, March 20, 2025
- Contracts, Claims, and Documentation
Thursday, May 15, 2025
- People Management Workshop
Thursday, June 12, 2025
- Strategic Negotiation Workshop
Friday, June 13, 2025

Mental Health

- Achieving Work-life Balance
Friday, January 24, 2025
- Happiness: Owning your 40
Friday, February 7, 2025

Service

- Delivering the Ultimate Service Experience
Friday, April 11, 2025



Plan Accordingly! Take note of these important MCAA Events:

IPM Class 91, Week 2 – Austin, TX	January 12 – 16, 2025
IPM Class 92, Week 2 – Austin, TX	January 13 – 17, 2025
2025 Safety & Health Conference – Fort Lauderdale, FL	January 13 – 16, 2025
Advanced IPM Class 21 – Austin, TX	January 19 – 23, 2025
2025 MEP Innovation Conference – Los Angeles, CA	January 27 – 30, 2025
MCAA 2025 Annual Convention – Austin, TX	March 2 – 6, 2025
IPM Class 93, Week 1 – Austin, TX	April 6 – 10, 2025
IPM Class 94, Week 1 – Austin, TX	April 7 – 11, 2025
Field Leaders Conference – Washington, DC	May 12 -14, 2025
2025 WiMI Conference – Kansas City, MO	June 16 - 18, 2025
2025 Converge – Minneapolis, MN	June 23 – 25, 2025

MCAA Contacts:

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

For conference & conventions, contact Melissa Rogers at mrogers@mcaa.org

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

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

For online webcasts & MSCA, contact Teresa Pezzi at tpezzi@mcaa.org



2025 INSTRUCTORS



Troy Aichele has spent 30 years in the mechanical construction industry, with extensive experience in office buildings, high-rise, hospitality, hospitals, casinos, and schools in both remodel and new construction environments. Troy is recognized as an effective team builder as well as a leader in business and sales planning, scheduling, cost-control, design, constructability, value engineering, and labor productivity. Troy expediently problem solves with personnel ranging from field workers, contractors, engineers, architects, accountants, purchasing, insurance and bonding agents, auditors, and developers on large scale projects that differ in teams, schedule, location, and design.

While Troy was growing his career as a mechanical contractor, he pursued his passion to contribute to both local and national mechanical affiliations and contribute to the education and training of current and future mechanical contractors. To serve the former, Troy served on Mechanical Contractors Association of America (MCAA) Board of Directors, John R. Gentile Foundation (formally MCERF) Board of Trustees and as Chairman of the MCAA's Career Development Committee overseeing more than 60 student chapters in North America and managing the annual National Student Chapter Competition.



For over 25 years, **David Ashcraft** has delivered high-content, entertaining, and engaging presentations. His expertise is converting dry, forgettable data into educational and inspiring training sessions. Individuals who attend David's classes will take away tools, tips and techniques that will make them more effective, efficient, and successful. Beyond the training room, David works with businesses to improve their profitability and bankability. David works with individuals to increase their executive presence, leadership skills, and communication effectiveness. David received his BA in Communications from Washington State University and is a graduate of Pacific Coast Banking School, where he was elected class president and later served as an associate director. He designed and delivered "The Ultimate Business Banker" sales and credit training program for financial institutions including Chase, Wells Fargo, Bank of the West, and many others. He has taught at University of Washington, Graduate School of Banking Colorado and Graduate School of Banking at LSU.



Since early 2021, **Chris Carr's** companies (Farotech and Dynaimix.ai) have 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 inescapable conclusion: the large majority of businesses are simply not ready for this massive disruption from AI. Whether it's a lack of understanding, preparation, or awareness, many companies stand on the brink of a transformative era without the tools to navigate it. His workshops are more than just a learning opportunity; it's 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. He is also the CEO & Founder of Farotech, a Comprehensive Digital Marketing Agency in Philadelphia.



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 a foreman, journeyman, sales manager, project manager, corporate trainer, and partner for a multimillion-dollar specialty services contractor.

Kevin has also been a frequent speaker for various 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 industry's 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 14 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, individual mechanical contractors, and JATC programs across the country. She is an approved instructor for the MCAA NEI program where she conducts training at both the national and local levels. 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 Executive Coaching, Change Management, Training Program Design, Strength Finders Coaching, DISC, Emotional Intelligence, Checkpoint 360, Profiles XT, Clifton Strengths Finders, Hogan Assessments, and Blanchard's Situation Leadership II.



Eric Herdman is an accomplished speaker, business leader, and facilitator, who has been speaking professionally in-person for almost 3 decades and as a virtual presenter for nearly 5 years. During his training sessions Eric will entertain, inform, educate, and engage your audiences into action. Eric delivers more than just a seminar; you get an educational training experience.

Herdman 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.

2025 INSTRUCTORS



John R. Koontz has over four decades 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 and is the founder of the 1st ever MCAA student chapter that was started at Purdue in 1993. 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. Koontz is familiar with the operational practices, leadership, and operations personnel of hundreds of mechanical contractors and is therefore, considered an expert in "Mechanical Contracting Operational Best Practices". He has studied great mechanical contractors, great project managers and great field leaders for over 30 years and incorporates their best practices into all his classes. John's core belief that project managers and field leaders must develop a strong partnership on every project is discussed and explained for application in every class he teaches.



Rosemary Laack is a three-time award winning leader and speaker who uses her energetic trademark approach to coach, speak and train all over the world.

Her passion and talent for understanding the unique challenges business professionals face today is the crux of her tremendous appeal and success. This ability has formed the core value of her sessions on assertive communication, leadership, and conflict management. Rosemary earned two bachelor's degrees—one in business and one in music—from Indiana University-Bloomington. She got her business initiation over 20-years ago when she became a purchasing manager with Procter & Gamble. Then, she joined Unilever as a category manager of packaging. Rosemary led continuous improvement teams in reducing packaging scrap by 50%. Rosemary went on to the pharmaceutical industry working with Valeant Pharmaceuticals where she managed one of the top brands and trained sales staff on brand intelligence and promotions. This earned her yet another award for her exceptional leadership skills. In 2007, Rosemary founded her own coaching and professional speaking firm. By the end of the year, she had earned the America's Brightest Speaking Star award for her speaking excellence.



Mark Matteson started his career as an HVAC technician in 1976. He is one of those rare professionals who can say he is publisher, TEDx speaker, consultant, podcaster and author and mean it. He has attracted clients in HVAC contracting, distribution and manufacturing as well as such organizations like Amazon, Microsoft, T-Mobile, John Deere, Conoco-Phillips, Aflac, New York Mutual Life and other Fortune 500 companies on three continents. A committed writer and Publisher, Mark has written eight books and five e-books. He is interviewed frequently and has been quoted in the media and has written hundreds of articles for dozens of magazines. He is considered a thought leader, an idea reporter and agent of change who teaches his clients HOW TO GET MORE OF THE RIGHT THINGS DONE IN LESS TIME. He has done work internationally in Australia, Canada, Aruba, Mexico and Turkey. Furthermore, he has worked in 48 states in the U.S.



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 a Past President of the Mechanical Contractors Association of America. He is also Founder and President of West Chester Mechanical Contractors (WCM), an HVAC, service and plumbing contractor that serves the Philadelphia, Pennsylvania area. WCM was named Plumbing & Mechanical’s 2017 Mechanical Contractor of the Year. Mark graduated from the apprenticeship program and started his career as a steamfitter at Local 420 in the early 1990s. At the age of 30, he founded West Chester Mechanical in 1996, which 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 WCM, he immediately got involved with MCAA. He served on several task forces that developed education programs and was asked to be Chair of the MCAA Education Committee. In 2003, he was appointed to the MCAA Board of Directors and currently serves on the President’s Advisory Council. Mark also served as the President of the association’s foundation, the John R. Gentile Foundation (JRGF) and co-chaired the UA/MCAA Strategic Planning Committee beside UA General President Mark McManus for 15 years. Additionally, he is a graduate of MCAA’s industry-leading Advanced Leadership Institute as well as the 2017 recipient of MCAA’s highest honor, the Infinity Award for Distinguished Service.



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 pain staking task, because he believed in the Revit engine. Since the acquisition, it has been an exciting and patient journey as the fabrication tools continue to find their way into Revit. Building RFA fittings is a past-time Suggs does not miss, and he can now focus on helping customers take their databases they have been using in CAD for so many years and turning them into Revit friendly versions of their previous selves, as well as building databases from the ground up to support specific needs of the end user.

COMPUTER SKILLS AND TECHNOLOGY

The State of AI for Mechanical Contracting

IN-PERSON TRAINING

Chris Carr

Thursday, January 9, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

This session provides a comprehensive overview of where artificial intelligence is now, where it's going, and how your organization can be prepared. We explore the key innovations in AI from the past 6 months to a year, examining how these technologies can be applied today and what to watch for in the future to stay ahead of the curve. We discuss practical ways to integrate large language models like ChatGPT and Google Gemini into daily tasks, specifically designed for mechanical contractors who are in the office and also in the field working hands-on with projects. The session also highlights the impact of robotics on mechanical contracting, offering insights into how these advancements can revolutionize the industry.

The State of AI for Office-Based Mechanical Contractors

IN-PERSON TRAINING

Chris Carr

Friday, January 10, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

This session is designed specifically for mechanical contractors who spend the majority of their time in the office and behind a computer. We begin with an in-depth exploration of the state of AI, covering critical aspects such as:

- The latest innovations in AI from the past 6 months to a year.
- How these technologies can be applied today and what to watch for in the future to stay ahead of the curve.
- The impact of robotics on mechanical contracting.

In the second half of the day, we implement highlights from my "AI in a Day" workshop. Participants will bring a laptop and dive into the essential tools that every organization needs to know now. We also explore how to use prompt engineering to improve efficiency and effectiveness and discuss practical ways to integrate large language models like ChatGPT and Google Gemini into daily tasks, ensuring your team is equipped to leverage AI effectively in your daily operations.

Microsoft Project 2019 – Part 1

VIRTUAL

New Horizons Computer Learning Center

Friday, January 31, 2025

8:00 a.m. – 4:00 p.m.

Member: Free

Non-Member: \$299



This course is designed for a person with an understanding of project management concepts, as well as general desktop computer skills, and who will be responsible for creating and maintaining project plans. This course will give you the fundamental understanding of Microsoft Project necessary to construct basic project plans. In this course, you will be able to construct basic project plans using Microsoft Project. You will: identify project management concepts and navigate Microsoft Project Professional, create a new project plan, add tasks to a project, manage task relationships within a project, manage project resources, and finalize a project plan.

Microsoft Project 2019 – Part 2

VIRTUAL

New Horizons Computer Learning Center

Friday, February 28, 2025

8:00 a.m. – 4:00 p.m.

Member: Free

Non-Member: \$299



This course is designed for a person with an understanding of project management concepts and who is responsible for creating and maintaining project plans. Target students will be looking to acquire the advanced knowledge and skills needed to update a project plan in Microsoft Project during the execution, monitoring, and controlling phases of a project. In this course, you will maintain project plans during the execution, monitoring, and controlling phases of a project. You will: update a project plan, generate project views to manage a project, create project reports to share a project's status, reuse project plan information, and work with multiple projects.

Microsoft Excel 2019 – Part 1

VIRTUAL

New Horizons Computer Learning Center

Friday, April 25, 2025

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

COMPUTER SKILLS AND TECHNOLOGY

CONTINUED

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

Friday, May 9, 2025

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

Wednesday, May 28, 2025

8:00 a.m. – 4:00 p.m.

Member: Free

Non-Member: \$299



This course builds upon the foundational and intermediate knowledge presented in the Microsoft® Office Excel® 2019: Part 1 and Microsoft® Office Excel® 2019: Part 2 courses to help you get the most of your Excel experience. The ability to collaborate with colleagues, automate complex or repetitive tasks, and use conditional logic to construct and apply elaborate formulas and functions will put the full power of Excel right at your fingertips. The more you learn about how to get Excel to do the hard work for you, the more you'll be able to focus on getting the answers you need from the vast amounts of data your organization generates. This course is intended for students who are experienced Excel 2019 users and have a desire or need to advance their skills in working with some of the more advanced Excel features. Students will likely need to troubleshoot large, complex workbooks, automate repetitive tasks, engage in

collaborative partnerships involving workbook data, construct complex Excel functions, and use those functions to perform rigorous analysis of extensive, complex datasets. To ensure success, students should have practical, real-world experience creating and analyzing datasets using Excel 2019. Specific tasks students should be able to perform include: creating formulas and using Excel functions; creating, sorting, and filtering datasets and tables; presenting data by using basic charts; creating and working with PivotTables, slicers, and PivotCharts; and customizing the Excel environment.

Bluebeam – BEGINNER

VIRTUAL

Christopher Suggs

Wednesday, February 19, 2025

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

Friday, March 7, 2025

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)

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CONTINUED

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

VIRTUAL

Christopher Suggs

Wednesday, March 26, 2025

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

Basic Principles and Methods of Estimating – Part 1

IN-PERSON TRAINING

Keith Rahn

May 21, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

This course will cover the following:

Role of the Estimator: Investigate how bid strategies are developed for companies and how estimators implement that strategy. We will look at bidding documents and procedures for evaluating the project; such as procurement, analyzing/visualization, pre-bid conference, addendums and preparing bid documents.

Take Off and Pricing in the Relationship to the Project Delivery System: The way we take-off and price the project is determined by the project delivery system the owner is using. We will examine the different P.D.S. and how it affects the bid.

Effective Estimate Procedures: Gain an understanding of proper procedure and organization of putting an estimate together. Topics included are stripping of material and equipment, material/equipment pricing sheet and final bid documentation. Attendees will be presented with a project to practice estimate techniques learned.

Basic Principles and Methods of Estimating – Part 2

IN-PERSON TRAINING

Keith Rahn

June 4, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

This course will cover the following:

Sub-Contractor and Vendor Coordination: Early in the bidding process your subcontractors and vendors need to be identified. Coordinating their scope of work is extremely important to developing a competitive bid.

Laboring Techniques: The best contracting firms have an excellent understanding of their labor productivity. We will examine how the MCAA Labor Estimating Manual is utilized and how known productivity rates can be used in costing and also how an effective crew mix can make you competitive.

Finalizing the Estimate: Attendees will apply previously learned estimate techniques to their own project estimate given in the class. Bid time pressures and how to better control them will be discussed.

Delivering the Bid: A good competitive price and a well written proposal is essential to getting the work. We will look at developing a clear scope of work and a professionally formatted proposal letter.

FOREMAN TRAINING

Foreman Training 1: Project Planning Skills and Productivity & Efficiency

IN-PERSON TRAINING

Field Leadership Academy

John Koontz

Thursday, February 20, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

The Field Leader's role in project planning and execution has the greatest effect on overall project success or failure. Therefore, the effective collaboration between the project manager and the foreman, before a project starts, is always necessary regardless of project type, size, or risk profile. This session will specifically focus on the role of the Field Leader and will cover three essential areas of planning: turnover meetings, pre-construction planning, and on-going short interval planning. In addition, the instructor will discuss and explain the Field Leader's specific role in collaborating with the project team regarding job cost control, labor coding and tracking, value engineering, decision-making, risk evaluation, scheduling, coordination, fabrication, change management, and safety.

This session is specifically tailored to the Role of the Field Leader. Great project management, by both the foreman and project manager, is primarily responsible for creating the best possible productivity on every project. Due to the endless number of variables, which negatively affect worker efficiency, excellent productivity is the project team's greatest challenge. Productivity also has the greatest positive or negative impact on project and company profitability as labor cost is always the contractors' primary risk. 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.

Please note that the registration fee for this course has been removed, but the cancellation fee has increased to \$150.

Foreman Training 2: Managing Labor and Time Management

IN-PERSON TRAINING

Field Leadership Academy

John Koontz

Thursday, March 27, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

The contractor's primary risks in the construction process are the estimating, budgeting, managing, and controlling of project labor costs. The attendee will explore the Field Leaders unique role in managing and controlling mechanical project labor costs. The importance of having a trust-based partnership between a Field Leader and their Project Manager will be explored, discussed, and explained. Their

specific roles in timekeeping, coding, tracking, and forecasting project labor hours and costs will be discussed. In addition, the instructor will present numerous methods for collaborative project labor cost control and cost management, all of which are based upon complete transparency between the Field Leader and the Project Manager.

The effective management of their own time is one of a Field Leader's greatest challenges and is often the root cause of their greatest failures. Construction productivity experts have known for many years that journeyman productivity has a direct correlation to a foreman's effectiveness. A Field Leader's effectiveness is also directly correlated to how efficiently and wisely they use their own time. In this session, the instructor will provide specific methods and practices for improving the efficiency and the overall effectiveness and efficiency of a Field Leader.

Please note that the registration fee for this course has been removed, but the cancellation fee has increased to \$150.

Foreman Training 3: Documentation and Managing Change

IN-PERSON TRAINING

Field Leadership Academy

John Koontz

Wednesday, May 7, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

This class will specifically examine the Field Leaders role in creating an ongoing written "first-hand account" of all significant project events that is clear, accurate, and complete. When done well, the Field Leader will provide their contractor with a powerful and nearly indisputable historical account of the project. The steps for planning and implementing the documentation process for a mechanical construction project will be reviewed and methods for improving the process will be discussed. The instructor will provide guidance, best practices, and expertise in the areas of Contractual Notice, Foreman Daily Logs, Photographs and Videos, Meeting Minutes, Follow-up Emails, Change Management, Field Authorization, Schedule Issues, Weather, Professionalism, Material Deliveries, etc.

This class equips construction foremen with the basic skills and knowledge to effectively manage changes and change orders on the jobsite. Field Leaders will learn how to identify potential changes early, communicate them clearly, and navigate the change order process with their project manager to avoid disruptions to the project and the budget. We will review the specific nature of the Field Leaders role, and the importance of their trust-based partnership with their Project Manager, in managing changes and change orders. In addition, the instructor will briefly discuss the topics of Contractual Notification, Written Direction, Authorization, Record Requirements, Labor Cost Control Requirements, Impact Costs, and Customer Relationships.

Please note that the registration fee for this course has been removed, but the cancellation fee has increased to \$150.

The Real Cost of a Manhour and High Impact Leadership

IN-PERSON TRAINING

Mark Rogers

Thursday, May 29, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

Learn how much an hour of labor truly costs and how that cost determines a contractor's ability to compete against the Open Shop. This session will teach attendees how an hour of labor cost is determined and all that is factored into this rate. They will then be shown how that is used in an actual estimate of a project and compare that to the bid of an Open Shop contractor bidding the same project.

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 when 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.



Discovering Your Leadership Style and Methods to Provide Effective Feedback

IN-PERSON TRAINING

Eric Herdman

Friday, January 17, 2025

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179

The Leader Within: Unlocking Your Authentic Leadership Style

Through an assessment to determine each learner's style, a series of interactive exercises, and group discussions, participants will delve deep into their personal strengths, values, and experiences that shape their approach to leadership. Attendees will be guided through various leadership models and theories, helping them to identify which elements resonate most with their individual personalities and professional contexts. Participants will learn "how to" and "how to implement" for all of the content.

Participants will also gain insights into areas for potential growth and development, enabling them to become more versatile and adaptable in their leadership roles. This training not only focuses on self-discovery but also provides practical tools relevant to today's workforce and all of its generational uniqueness and strategies for implementing newfound insights in real-world scenarios, ultimately leading to more authentic and impactful leadership.

From Insight to Action: Providing Effective Feedback

This workshop covers the essentials of delivering feedback that promotes growth, builds trust, and improves performance. The session covers key principles including how to deliver feedback in a respectful, motivating manner and how to tailor feedback to individual needs and situations. Participants will learn techniques for giving constructive, actionable feedback in a way that encourages positive change and enhances team dynamics. Through this workshop, attendees will gain confidence in communicating feedback respectfully and effectively, whether in one-on-one meetings or group settings. By the end of the class, participants will be equipped with practical tools to deliver feedback that motivates, encourages growth, and strengthens professional relationships.

Leadership Skills for New Managers

IN-PERSON TRAINING

Rosemary Laack

Wednesday, February 12, 2025

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179

No one has to tell you how challenging, unpredictable and just plain hard your job can be. Not only do you have to manage your basic responsibilities, but you also need to supervise a colorful group of personalities, overcome emergencies and resolve conflicts. If you'd like to discover how to flawlessly handle these diverse roles, then this program is for you. Specifically, you'll learn how to

LEADERSHIP AND PROFESSIONAL DEVELOPMENT SKILLS

deliver clear communication, delegate responsibilities, manage poor performance and boost your team's productivity. More importantly, you'll gain valuable insight on how to effectively transition from worker to supervisor for greater respect and trust. Prepare to leave with numerous tools and tips you can implement immediately to guarantee your success.

Managers and supervisors will leave with an improved understanding of how to communicate effectively with a diverse team of people for greater productivity. This session will also help attendees better project the image of a strong, confident and capable leader to employees.

It's About Time

IN-PERSON TRAINING

Mark Matteson

Wednesday, April 16, 2025

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179

Each of us has 24 hours in a day, no more, no less. Imagine having your best year ever. Imagine information that would assist you in getting more of the right things done in less time? What if you could be 20% more effective in your business or job? Imagine achieving your professional and personal goals in a fraction of the time. Well, "It's About TIME" is just the seminar for you. Based on the Best Selling Book of the same name.

Thriving as a Contractor: Strategic Planning, Best Practices, and Deadly Sins to Avoid

IN-PERSON TRAINING

Kevin Dougherty

Wednesday, April 30, 2025

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179

Is your contracting business ready for change? Is your business prepared for the changes facing the construction industry? Trends like shrinking margins and more complex jobs with less time to complete them can make just surviving an almost impossible challenge. This program will help you to establish goals and strategies to keep pace with the lightning-fast changes in the market, enabling you to not just survive, but also succeed.

Project Management 1: Planning Skills for the Project Team

IN-PERSON TRAINING

Project Management Academy

John Koontz

Friday, February 21, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

All great project managers are master planners. All wildly successful projects are incredibly well planned by all members of the project team; project manager, foreman, fabrication manager, VDC/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 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 the collaborative planning efforts of the project manager and their foremen and its direct relationship to increased project efficiency and profitability.

Please note that the registration fee for this course has been removed, but the cancellation fee has increased to \$150.

Project Management 2: Mechanical Scheduling and Productivity Improvement for Mechanical Projects

IN-PERSON TRAINING

Project Management Academy

John Koontz

Friday, March 28, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

The days of relying upon unrealistic and illogical schedules created by General Contractors and Construction Managers are long gone. In today’s complicated and challenging construction market, Mechanical Contractors must become project leaders, not continue to be project followers. To be a project leader, the mechanical project manager must collaboratively develop a logical, reasonable, and achievable mechanical project schedule. The mechanical work must then be managed against that schedule and thereby using it as a project baseline. Scheduling the mechanical work also provides more project control and better documentation when projects, which are often delayed by others, are forced to accelerate to meet the original completion date. Mechanical contractors who do little project scheduling often find themselves at the mercy of unrealistic CM/GC/owners’ schedules that lack detailed mechanical activities. The instructor will clearly explain to attendees why a mechanical schedule is mandatory on all projects, and he will vigorously emphasize his belief that “If you have no schedule, you have no plan”. In addition, John will provide attendees with many of the critical issues, rules of thumb, and best practices for creating and managing project schedules for mechanical projects.

PROJECT MANAGEMENT

CONTINUED

Great project management, by both the foreman and project manager, is primarily responsible for creating excellent productivity on every project. Due to the endless number of variables, which negatively affect worker efficiency, excellent productivity is the project team's greatest challenge. Productivity also has the greatest positive or negative impact on project and company profitability. Excellent productivity requires proactive, diligent, and detailed planning by the project manager and foreman at each step of the project. In this session, the instructor will provide proven methods and practices for creating, controlling, and improving project productivity on all types of projects.

Please note that the registration fee for this course has been removed, but the cancellation fee has increased to \$150.

Project Management 3: Fundamentals of Job Cost Control and Project Billings and Maintaining Positive Cash Flow

IN-PERSON TRAINING

Project Management Academy

John Koontz

Thursday, May 8, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

This session is specifically tailored to the role of the Mechanical Project Manager and their unique responsibilities for budgeting, controlling, and forecasting project costs. The instructor will provide attendees with a fundamental understanding of how to use their project 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. Special emphasis will be placed upon the many unique topics that are related to successfully budgeting, controlling, and accurately forecasting project labor costs. The project manager's partnership, transparency, and collaborative efforts with their project foremen regarding labor cost control will be specifically emphasized.

Maintaining positive cash flow is one of the project manager's greatest challenges. The construction industry's standard project billing and payment model is a lousy formula that has the potential to create poor cash flow on nearly every project. This session focuses on how the project manager, with planning, creativity, excellent project execution, and positive customer relationships can regularly create positive project cash flow on most of their projects. The instructor will provide the class with numerous lessons, methods, ideas, and tactics which will lead to a more likely positive cash flow position on most projects.

Please note that the registration fee for this course has been removed, but the cancellation fee has increased to \$150.

Core Leadership Skills for the Project Manager

IN-PERSON TRAINING

Leah Gutmann

Thursday, February 6, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

The best Project Managers think beyond basic project deliverables. They know that achieving next level project and career goals requires a focus on the greatness of those around them. They build relationships with intention, motivate their teams, and know when to manage and when to lead. During this class, participants will put these concepts into practice through specific project applications and case studies. The group will leave with a personalized roadmap to leadership where they will be challenged to reflect on their own leadership strengths and areas for improvement. Students will identify core leadership principles that, if leveraged, will move the needle for their effectiveness on the job. The group will also learn a specific model they can apply to build essential skill sets in those around them and, as a result, motivate and inspire others to go above and beyond.

Objectives:

- Analyze the difference between being a manager and a leader.
- Discover what it means to be a situational leader and learn how to match the right leadership approach with individual skill levels.
- Discuss the importance of motivation and appreciation in accomplishing profit and productivity milestones.
- Apply core leadership principles and know what it means to lead “above the line.”



PROJECT MANAGEMENT

CONTINUED

Project Management Impact on Financial Outcomes

IN-PERSON TRAINING

David Ashcraft

Thursday, March 20, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

Project managers will have FUN as they work through a case study and uncover the math mystery buried in the WIP. They will calculate each column by hand to see where the numbers come from and recognize which numbers provide key information. The key information will spotlight problems and opportunities contained within the numbers of a financial report. Project managers, estimators, foreman, and accounting staff will increase their financial fluency and be able to communicate more effectively to get the right information to make projects more profitable.

Topics include:

1. How project managers impact the company income statement and balance sheet
2. How the WIP can affect year end profits and cash flow
3. Overbillings and underbillings and the impact of each
4. Analyze the difference between gross profit % and mark up %
5. WIP Case Study explaining what each column represents and where the math comes from
6. Explain what percentage of completion accounting is and why it is used



Contracts, Claims, and Documentation

IN-PERSON TRAINING

Troy Aichele

Thursday, May 15, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

This workshop is designed for Project Managers and Assistant Project Managers who want to deepen their understanding of key contractual concerns and elevate their project documentation. Participants will explore the critical aspects of managing contracts, including identifying potential risks and addressing them proactively. This session will also cover best practices for managing change orders and claims, ensuring documentation is clear and thorough. Attendees will walk away with practical tools and strategies that can help streamline processes, mitigate risk and improve overall project outcomes.

Participants will learn the following from this workshop:

- Types of contracts and top contractual concerns when reviewing (a contract checklist will be provided for future use)
- Killer contract clauses to avoid
- Notice requirements and change order (claim) procedures
- Best practices for RFI's, Change Orders and Notice Requirements
- Additional documentation techniques and when to use them (Measle Chart, Manpower Loaded Schedule, and Measured Mile)
- How Daily Reports are the single most important documentation tool on a project and strategies for filling them out.



People Management Workshop: Managing People for Mid-Level to Senior Project Managers

IN-PERSON TRAINING

John Koontz

Thursday, June 12, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

This workshop-based class is specific to the role of a project manager in the mechanical contracting industry and is designed to help mid-level to senior project managers develop essential people management skills to lead, motivate, inspire, and manage diverse teams effectively. This class is NOT directed towards individuals with little to no experience in managing other people. Participants will be split into teams and will explore strategies and methods for fostering collaboration, avoiding and resolving conflicts, delegating tasks, teaching, mentoring, and building high-performance teams. During this workshop, teams will review and strategize how to resolve numerous real-life people management situations that have been developed by the instructor. By the end of this class, attendees will be equipped with practical solutions and hands-on tools to manage relationships, enhance team dynamics, boost performance, and create positive work environments.

Please note that the registration fee for this course has been removed, but the cancellation fee has increased to \$150.

Strategic Negotiation Workshop: Negotiating Techniques for Project Managers

IN-PERSON TRAINING

John Koontz

Friday, June 13, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

This workshop-based class is specific to the role of a project manager in the mechanical contracting industry and is designed to help mid-level to senior project managers develop their overall project negotiating abilities. This class is created to be a follow-up to the class titled "Negotiating: Basic Negotiating Skills for PM's". After a short remedial lecture which re-acquaints the class with the basic concepts and principles of negotiating, participants will be divided into groups to engage in simulated negotiations with predefined objectives. Most of the class will focus on role-playing simulations. After each roleplay, participants will receive structured feedback on their performance and strategies for improvement. Examples of real-life scenarios could include, but will not be limited to: supplier delivery problems, subcontractor performance and/or payment issues, change order negotiation with a client, schedule compression or acceleration negotiation with a GC and/or CM, payment and/or non-payment issues, issues between you and your foreman and other labor and performance related issues, etc.

Please note that the registration fee for this course has been removed, but the cancellation fee has increased to \$150.

Achieving Work-Life Balance

IN-PERSON TRAINING

Eric Herdman

Friday, January 24, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

In this engaging course, attendees will learn to identify personal stressors and their impact on well-being, develop effective time management techniques, and create boundaries in an era of constant connectivity. The workshop will introduce mindfulness practices to reduce stress, along with personalized self-care routines that incorporate sleep, nutrition, and exercise. Participants will also explore flexible work arrangements and build resilience to navigate workplace challenges.

Ultimately, this workshop empowers individuals to align their personal values with professional goals, providing actionable steps for achieving a fulfilling and balanced lifestyle in today's demanding work environment.

YOUR CURRICULUM WILL INCORPORATE:

- **Understanding Work-Life Balance:** Learn the concept of work-life balance as the equilibrium between professional responsibilities and personal life in today's demanding work environment. What is realistic?
- **Stress Identification:** Develop skills to recognize personal stressors and understand their impact on overall well-being & productivity.
- **Productivity Strategies:** Acquire effective techniques for prioritizing tasks and setting achievable goals both professionally and personally.
- **Boundary Setting:** Gain strategies for creating and maintaining healthy boundaries between work and personal life, especially in an era of constant connectivity.
- **Mindfulness Practices:** Explore mindfulness techniques to reduce stress, enhance focus, and improve overall mental well-being in both work and personal settings.
- **Self-Care Routines:** Learn to design personalized self-care plans that incorporate essential elements such as sleep, nutrition, and exercise.
- **Scheduling:** Discover how completing tasks first thing in the morning and early in your day can increase motivation and drive throughout the rest of your day.
- **Routines:** Learn how routines can set you up for success with your work-life balance.
- **Workplace Flexibility:** Understand the benefits of flexible work arrangements and how they can contribute to achieving a better work-life balance.
- **Resilience Building:** Acquire tools for developing resilience to effectively navigate workplace challenges and prevent burnout, leading to a more fulfilling and balanced lifestyle.

Happiness: Owning your 40

IN-PERSON TRAINING

Leah Gutmann

Friday, February 7, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

What is the key to individual happiness? Studies show that up to 40% of a person's happiness is completely up to them. During this workshop, participants will explore the basis of happiness and our ability to permanently shift our happiness set point. The group will be challenged to own their own path to personal and professional satisfaction and discuss how to be accountable for our own actions or inactions. The group will tie the concepts of confidence, personality, and goal setting to sustainable happiness. Participants will learn happiness strategies that align with their personal leadership brand and share ideas for action. Each individual will set their own personal vision and commit to achievable strategies that will help them on their path to success.

Objectives:

- Define happiness and discuss what components of happiness are yours to control and drive.
- Know how to hold yourself accountable in all aspects of your life and take ownership of your opportunities, successes, and failures.
- Write your personal leadership brand statement.
- Set an intention to advocate for yourself as well as learn how to effectively advocate for those around you.
- Create and commit to an action plan that drives YOUR happiness.



Delivering the Ultimate Service Experience: A Guide for Technicians

IN-PERSON TRAINING

Kevin Dougherty

Friday, April 11, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

A program designed to grow and enhance new and current customer relationships.

Topics Covered:

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



CERTIFIED SAFETY – SAFETY RISK CONTROL

ClickSafety – Online Safety Courses

**Anytime – Accessible 24/7
online from your computer**

Member: Free (however CPMCA will bill for the cost of the class if 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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