



# **Mechanical Construction Education Alliance (MCEA)**

## **Training Catalog July– December 2025**

**Computer Skills and Technology | Estimating | Foreman Training  
Leadership and Professional Development Skills | Project Engineering  
Project Management | Service/Technical Trainings  
Certified Safety – Safety Risk Control**

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# CPMCA Executive Committee, Board of Directors

## Executive Committee – 2025

### **Ed Newville, President**

Southland Industries

### **Matt Cunningham, Vice President**

Jason & Blanc

### **Steve Valot, Secretary**

Pan-Pacific Mechanical

### **Robert Felix, Treasurer**

ACCO Engineered Systems

### **Steve Fosdick, Past President**

Murray Company

## CPMCA Board of Directors

### **Michael Cables**

Kinetic Systems, Inc.

### **Jeremy Clark**

TIMEC

### **Travis Craven**

ACCO Engineered Systems

### **Jeff Hachey**

H.L. Moe Company, Inc.

### **Adam Kaplan**

Sierra Commercial Plumbing, Inc.

### **John Modjeski**

University Mechanical & Engineering Contractors

### **Bryan Suttles**

Suttles Plumbing & Mechanical Corporation

### **Michael Teague**

Schultz Industrial Services, Inc.

### **Steve Valot**

Pan-Pacific Mechanical, Inc.

### **Larry Verne**

Verne's Plumbing, Inc.

### **Jack Malisani**

Performance Mechanical, Inc.

### **Mike Stewart**

Couts Heating & Cooling, Inc.

## Education Committee

### **Harry Bederian – Chairperson**

ACCO Engineered Systems

### **Daisy Brown**

Pan-Pacific Mechanical

### **Travis Craven**

ACCO Engineered Systems

### **Jason Gordon**

Prime SC Mechanical, Inc.

### **Michelle Lynn**

CPMCA

### **Beni Monaco**

Monaco Mechanical

### **Bryan Suttles**

Suttles Plumbing & Mechanical Corporation

## CPMCA Staff

### **Chip Martin**

Executive Director

### **Denell Giustorobelo**

Office Manager

### **Michelle Lynn**

Director of Special Projects

### **Tiffany McGee**

Director of Education

## Executive Director's Message

CPMCA's **Mechanical Construction Education Alliance (MCEA)** is proud to present our membership with the 24th semi-annual course catalog. Our education program continues to thrive, thanks to our exceptional instructors and strategic partnerships with other trade associations. We are committed to curating our classes thoughtfully to meet your needs while addressing the most relevant topics in the mechanical contracting industry.



Classes are underway at 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 is serving as a hub for hands-on training and workshops, fostering collaboration and skill development among our members. Additionally, in partnership with the A&J Training Trust, we are offering more classes in multiple locations across Southern California to better serve our members across a large geographic area.

We encourage you to explore the new course offerings in this guide and take advantage of these highly sought-after classes and the wealth of knowledge our instructors have to share. 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.

*continued on page 4*

# 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 academies, **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 subcontractors and others, 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 subcontractors and others, communication and leadership skills, contracts, documentation, change orders, 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  
July–December 2025

## July

- 10 Project Management 4 \* #
- 17 Project Management 5 \* #

## August

- 6 WebLEM Training \*
- 8 Delegation Essentials: From Overload to Efficiency
- 13 Financial Construction Foundations for Foremen
- 20 Microsoft Excel 2019 – Part 1 \*
- 27 Scheduling from an MEP Perspective and How to Build a Mechanical Schedule

## September

- 5 Taking Flight with DISC
- 10 Microsoft Excel 2019 – Part 2 \*
- 18 Foreman Training 4 †
- 19 Project Management 6 #
- 24 WebLEM Training
- 26 Bluebeam Beginner \*

## October

- 3 Basic and Advanced Mechanics Lien
- 15 Microsoft Excel 2019 – Part 3 \*
- 17 Fundamentals of Project Engineering in the Construction Industry
- 23 Foreman Training 5 †
- 24 Project Management 7 #
- 29 Advanced Leadership Skills for Middle Managers
- 31 Bluebeam Intermediate \*

## November

- 6 Change Management: Being a Leader of Change
- 14 Bluebeam Advanced \*
- 19 Foreman Training 6 †
- 20 Project Management 8 #

## December

- 5 HVAC 101 for Non-Technical Employees
- 10 Billings and Cashflow and Job Cost, Labor Control and Post-Job Reviews

\* 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](http://www.ajtraining.org) for more information.

## How to Register for CPMCA Trainings

There are two ways to register:

- 1) Go to [www.cpmca.org](http://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](mailto:Tiffany@cpmca.org).

# SCHEDULE AT A GLANCE BY TRACK

## Computer Skills and Technology

- Microsoft Excel 2019 – Part 1 \*  
Wednesday, August 20, 2025
- Microsoft Excel 2019 – Part 2 \*  
Wednesday, September 10, 2025
- Microsoft Excel 2019 – Part 3 \*  
Wednesday, October 15, 2025
- Bluebeam BEGINNER \*  
Friday, September 26, 2025
- Bluebeam INTERMEDIATE \*  
Friday, October 31, 2025
- Bluebeam ADVANCED \*  
Friday, November 14, 2025

## Estimating

- WebLEM Training \*  
Wednesday, August 6, 2025
- WebLEM Training  
Wednesday, September 24, 2025

## Foreman Training

- Financial Construction Foundations for Foremen  
Wednesday, August 13, 2025
- Foreman Training 4 †  
Thursday, September 18, 2025
- Foreman Training 5 †  
Thursday, October 23, 2025
- Foreman Training 6 †  
Wednesday, November 19, 2025

## Leadership and Professional Development Skills

- Delegation Essentials: From Overload to Efficiency  
Friday, August 8, 2025
- Taking Flight with DISC  
Friday, September 5, 2025
- Advanced Leadership Skills for Middle Managers  
Wednesday, October 29, 2025
- Change Management: Being a Leader of Change  
Friday, November 6, 2025

## Project Engineering

- Fundamentals of Project Engineering in the Construction Industry  
Friday, October 17, 2025

## Project Management

- Project Management 4 \* #  
Thursday, July 10, 2025
- Project Management 5 \* #  
Thursday, July 17, 2025
- Project Management 6 #  
Friday, September 19, 2025
- Project Management 7 #  
Friday, October 24, 2025
- Project Management 8 #  
Thursday, November 20, 2025
- Scheduling from an MEP Perspective and How to Build a Mechanical Schedule  
Wednesday, August 27, 2025
- Basic and Advanced Mechanics Lien  
Friday, October 3, 2025
- Billings & Cashflow and Job Cost, Labor Control and Post-Job Reviews  
Wednesday, December 10, 2025

## Service

- HVAC 101 for Non-Technical Employees  
Friday, December 5, 2025

### \* Virtual Training

### † Field Leadership Academy

### # Project Management Academy



## Plan Accordingly! Take note of these important MCAA Events:

2025 AEC Best Practices Conference – Boston, MA	July 27 – 30, 2025
ALI Course 25, Week 1 – Chapel Hill, NC	September 7 – 10, 2025
2025 Fabrication Conference – Philadelphia, PA	September 8 – 10, 2025
Field Leaders Conference – Toronto, Ontario	September 15 – 17, 2025
IPM Class 93, Week 2 – Austin, TX	September 21 – 25, 2025
IPM Class 94, Week 2 – Austin, TX	September 22 – 26, 2025
Foundations of Field Leadership Course 9	September 25 – November 13, 2025
Foundations of Field Leadership Course 10	September 30 – November 18, 2025
2025 Collective Bargaining Seminar – Las Vegas, NV	October 5 – 7, 2025
2025 UA/MCAA Labor Relations Conference – Las Vegas, NV	October 7 – 9, 2025
2025 MCAA GreatFutures Forum – Salt Lake City, UT	October 9 – 11, 2025
IPM Class 95, Week 1 – Austin, TX	October 12 – 16, 2025
IPM Class 96, Week 1 – Austin, TX	October 13 – 17, 2025
ALI Course 25, Week 2 – Chapel Hill, NC	November 2 – 6, 2025
2025 Industry Funds Conference – Longboat Key, FL	December 3 – 5, 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 [mr Rogers@mcaa.org](mailto:mr Rogers@mcaa.org)

For Advanced Leadership Institute and/or Institute for Project Management contact Amy Harding at [amy@hardingworks.org](mailto:amy@hardingworks.org)

For online webcasts & technology conferences, contact Sean McGuire at [smcguire@mcaa.org](mailto:smcguire@mcaa.org)

For online webcasts & MSCA, contact Teresa Pezzi at [tpezzi@mcaa.org](mailto: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.



**Lisa Austin** is the founder and President of Austin Training Advisors, a Denver-based corporate training company specializing in employee development for the commercial HVAC industry. A seasoned trainer and dynamic workshop leader, Lisa brings more than 25 years of experience helping companies strengthen customer service, communication, and employee engagement.

Since launching ATA, Lisa has designed and delivered highly customized workshops that focus on building the soft skills essential for success in today's fast-paced business world. Prior to founding her own company, she served as a senior trainer for a major mutual fund organization, where she tackled the challenges of leading teams through constant change.

Over the past two decades, Lisa has become a trusted partner to elite HVAC companies across the country, as well as local and national associations including MCA and MSCA. Her high-energy style, practical insights, and interactive approach consistently inspire teams to grow both professionally and personally.

Originally from New England, Lisa now calls Parker, Colorado home. Outside of work, she enjoys spending time with family and friends and exploring the great outdoors in the Rocky Mountains.



**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. Harry is deeply committed to inspiring young professionals to embrace and thrive in the mechanical contracting industry. Throughout his career, he has held various positions, including but not limited to, Project Manager, Sr. Project Engineer, and Estimator. He has worked on diverse projects, including the construction of Gas Fired Power Plants, Solar Power Plants, and Gas Compressor Stations, as well as construction within refineries.

His involvement in the industry is diverse, serving as the CPMCA Education and Scholarship Committee Chair since 2010, a CPMCA Board Member, a mentor to the USC and Cal Poly Pomona MCA Student Chapters, an Industry Advisor to the Cal Poly Pomona Engineering Department, and a member of the Project Management Institute. In 2024, Harry became a member of the MCAA Career Development Committee where he can continue to have a positive impact for the entire industry across the country. Harry recognizes that constantly improving and adding to his skillset is vital to being successful in this industry and thus, obtained his Project Management Certificate at The University of California, Los Angeles (UCLA) and completed a Masters Degree in Project Management from the University of Wisconsin.



**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



**E. Scott Holbrook, Jr.** is a partner with Crawford & Bangs, LLP. and has been with the firm for more than 30 years. Mr. Holbrook is Legal Counsel to the Los Angeles/Orange County/Inland Empire Chapter and Legal Counsel to the California Chapter of the American Subcontractors Association. On a national level he serves on the Board of Directors for the American Subcontractors Association, was Chairman of the American Subcontractors Association Attorneys Council in 2007-2008, as well as currently chairing the Subcontractors Legal Defense Fund Task Force and serving on the Task Force for Model Subcontracts since 2000. He is also a member of the Christian Legal Society and the Los Angeles County Bar Association Construction sub-section.

Mr. Holbrook has been married over 30 years to his wife Marla and they have three children.



**Ron King** joined MCAA National Office in April 2024 as Director, NCPWB & WebLEM responsible for welding procedures, welder qualification tracking and labor units for the association. Prior to MCAA, he was employed for 17 years by Trimble MEP as Director of Industry Relations and Business Development. Prior to joining Trimble, he was employed for 17 years by GEM INC, a multi-trade contractor in Northwest Ohio, providing a broad range of industrial construction services. He also participates on the Pipe Fabrication Institute (PFI) Engineering Committee and various ELECTRI International Task forces.



**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.



**Brad Perkins** is a Teaching Professor in the Department of Civil, Construction and Environmental Engineering at Iowa State University, where he has served since 2005. He also holds a concurrent appointment as an Interim Teaching Professor at Arizona State University's Del E. Webb School of Construction. A recipient of the Richard G. Schultze and Suzanne M. Schultze Teaching Fellowship, he brings a wealth of industry and academic experience to the classroom. He holds an M.S. in Civil Engineering and a B.S. in Construction Engineering, both from Iowa State University. Prior to entering academia, he worked as a mechanical engineer for KJWW Engineering and Black & Veatch, and served as a Nuclear Reactor Operator in the United States Navy. He is a licensed Professional Engineer in the State of Iowa.



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.



**Dianne Young** is a seasoned professional renowned for her dynamic approach and proactive mindset. From launching her first business during her college years to founding over a dozen successful companies, Dianne has demonstrated a relentless drive for innovation and entrepreneurship. Formerly associated with Dale Carnegie Training as an educator, Dianne transitioned to owning a Business Coaching Firm, where she strategically guided organizations to surpass their goals by leveraging their existing resources. Recognized for her innate ability to inspire excellence in others, she excels in unlocking individuals' true potential and igniting their professional growth. Dianne's passion for continuous improvement extends to her role as a keynote speaker at prestigious conferences like the Woman's Leadership Conference, National Association of Women in Construction and National Women in Business. Through her engaging and empowering presentations, Dianne inspires audiences to embrace collaboration and take decisive action towards success.

# COMPUTER SKILLS AND TECHNOLOGY

## Microsoft Excel 2019 – Part 1

**VIRTUAL**

**New Horizons Computer Learning Center**

**Wednesday, August 20, 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 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**

**Wednesday, September 10, 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, October 15, 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.



# COMPUTER SKILLS AND TECHNOLOGY

CONTINUED

## Bluebeam – BEGINNER

### VIRTUAL

**Christopher Suggs**

**Friday, September 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 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, October 31, 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)**

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**

**Friday, November 14, 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:

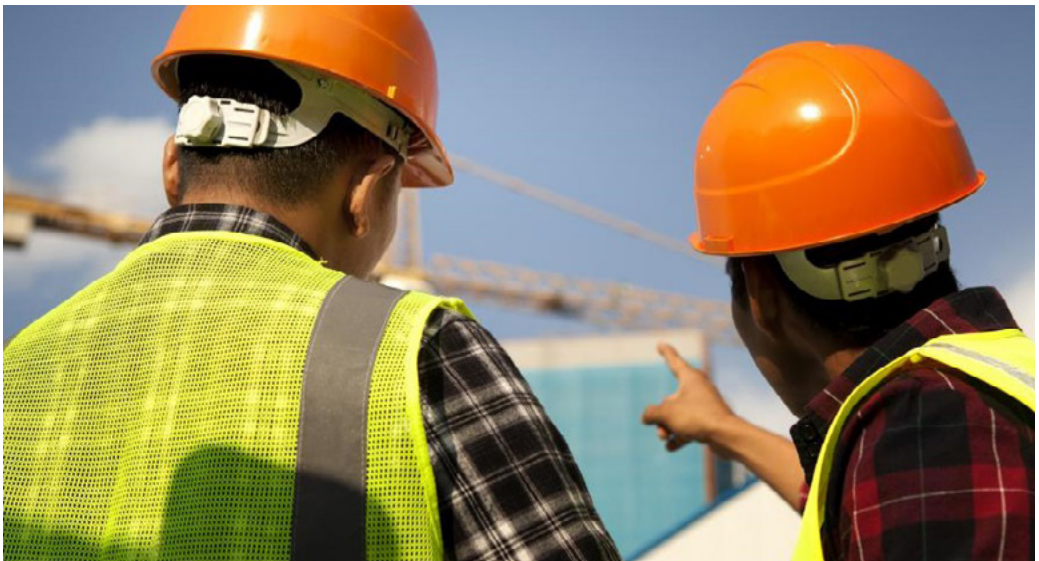
**Markups List:** Organizing, Sorting, & Filtering, Statuses, Custom Columns, Importing & Exporting, Custom Formulas, Quantity Link & Excel Templates

**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



# ESTIMATING

## MCAA WebLEM Fundamentals

### VIRTUAL

**Ron King**

**Wednesday, August 6, 2025**

**8:00 a.m. – 10:00 a.m.**

**Member: Free**

**Non-Member: Not available for non-members**

This informative presentation will give you a better understanding of the MCAA WebLEM and how to use the Component Method or Work Activity Method labor units as well as some general estimating practices. If you're new to estimating this seminar will teach you the basics of how to use this MCAA free member benefit, the WebLEM.

Agenda:

- WebLEM Update
- WebLEM site navigation
- Basic Assumptions
- Component vs WAM Labor Units
- Labor Factoring

#### **Target webinar attendee:**

New or beginner estimator (more experienced estimators will find this seminar too elementary)

New or beginner project manager

## MCAA WebLEM Fundamentals and a Little More!

### CPMCA TRAINING ROOM – TUSTIN

**Ron King**

**Wednesday, September 24, 2025**

**7:00 a.m. – 11:00 a.m.**

**Member: Free**

**Non-Member: Not available for non-members**

This informative presentation will give you a better understanding of the MCAA WebLEM and how to use the Component Method or Work Activity Method labor units as well as some general estimating practices. If you're new to estimating this seminar will teach you the basics of how to use this MCAA free member benefit, the WebLEM.

Agenda:

- WebLEM Update
- Basic Assumptions
- Labor Factoring
- Overtime Impacts on Productivity
- Component vs WAM Labor Units
- OPUS

- Industry Trends
- Bid/No-Bid Decisions

#### **Target seminar attendee:**

New or beginner estimator (more experienced estimators will find this seminar too elementary)  
Project manager

## Financial Construction Foundations for Foremen

### CPMCA TRAINING ROOM – TUSTIN

**Leah Gutmann**

**Wednesday, August 13, 2025**

**7:00 a.m. – 2:00 p.m.**

**Member: Free**

**Non-Member: \$179**

All field supervisors need to understand the impact they have on the financial outcomes of both the project and the company. As the first line of defense, the foreman has an important role in project financial goals and performance. By the end of this course, participants will understand why they should care about company financial performance and learn the key indicators of financial success on the job.

#### Objectives:

- Analyze and understand job cost and project risk factors from a foreman's perspective.
- Know how revenue and profits are created from job cost.
- Understand your role in influencing key project cost factors.
- Learn the real cost of doing business in the mechanical contracting industry.
- Identify the elements of the real cost of an hour of labor.



# FOREMAN TRAINING

## Foreman Training 4: Essential People Management Skills for Field Leaders and Managing Subcontractors

CPMCA TRAINING ROOM – TUSTIN

Field Leadership Academy

John Koontz

Thursday, September 18, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

Successful journeymen with unique abilities, but with little or no management training, are frequently promoted to “foreman” and then lead crews of workers on mechanical projects. This class is meant to be “initial management training”. People management skills are crucial for a construction foreman because they directly impact the efficiency, safety, and morale of the team, ensuring that a project progresses smoothly. The Field Leader interacts daily with subcontractors, other trades, and stakeholders and when they learn the basics and then work hard to become better “people managers”, they’ll have more successful projects and fewer stressful days. In this session the class will explore and discuss the basic people management skills that are relative to the position of jobsite foreman. In addition, the instructor will explain and emphasize those essential traits, skills, and behaviors that allow a foreman to more effectively manage their crews, their subcontractors, other trades, and their customers.

Subcontractors represent a significant portion of most mechanical contracts, and the performance of our subcontractors is a direct reflection of our own performance in the eyes of an owner, construction manager, or general contractor. On most projects, especially smaller and midsize projects, the field leader becomes so focused on crew leadership, material expediting, and work planning for our self-performed work that the performance and progress of our subcontractors’ work is often overlooked until problems arise. The field leader’s focused and effective daily on-site management of subcontractors is necessary to prevent unforeseen problems and ensure project success. In this session, the instructor will provide attendees with an understanding of the importance of developing trust-based relationships with subcontractors and will provide methods and best practices for successful subcontractor management.

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



## Foreman Training 5: Everyday Negotiating Skills for Field Leaders and Project Closeout: Best Practices for a Strong Finish

CPMCA TRAINING ROOM – TUSTIN

Field Leadership Academy

John Koontz

Thursday, October 23, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

Field leaders negotiate constantly—whether it's for time, space, manpower, equipment, or answers. They are regularly negotiating with their project managers, subordinates, general contractors, construction managers, owners, subcontractors, vendors, inspectors, safety personnel, and other trades. These daily negotiations have a major impact on project outcomes, yet most foremen have never had formal training in how to negotiate effectively. This session provides practical, jobsite-focused negotiating skills to help foremen communicate with greater confidence and achieve better results. Topics include preparation, negotiating styles, reading the other side, making strategic concessions, building relationships, handling pricing conversations, and sharpening questioning and listening skills.

The final phase of a project is often one of the most difficult for field leaders and their crews. Although the job may appear complete, it's typically filled with a wide range of small but critical tasks that must be addressed to satisfy contract closeout and occupancy requirements. At the same time, the team's focus and momentum have often shifted to future assignments, making it harder to focus on details, maintain productivity, and maintain a sense of urgency. While starting strong is essential for establishing early success, it's the way a project finishes that leaves the most lasting impression. Owners may forget how a project began, but they will always remember how it ended. The instructor will provide and discuss proven best practices for effective project closeout and will highlight the field leader's key role in delivering a productive, clean, timely, and professional project completion.

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



# FOREMAN TRAINING

CONTINUED

## Foreman Training 6: Project Leadership and Best Practices of Great Field Leaders

CPMCA TRAINING ROOM – TUSTIN

Field Leadership Academy

John Koontz

Wednesday, November 19, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

Field leadership isn't about titles—it's about responsibility, relationships, and consistent action. Mechanical foremen and superintendents play a critical leadership role on every project, yet most have received only minimal formal leadership training, if any. Participants will explore sixteen (16) practical, fundamental lessons that define what it means to be an effective field leader. The course challenges the idea that leaders are born—not made—and emphasizes that great leadership is developed through daily habits and actions, not position or power. Key topics include servant leadership, leading by example, effective planning, and building strong, trusting partnerships between field and office leaders. Special focus is placed on the foreman's role as a teacher, coach, and mentor—someone who not only directs work but also develops people. In addition, the session takes a candid look at the common mistakes almost every leader makes and provides practical strategies for avoiding or correcting them on the job. The instructor will equip attendees with the mindset, basic skills, and confidence to lead their project teams with purpose.

Why do some field leaders consistently outperform others in our industry? What truly separates a good foreman from a great one? While age, experience, and natural talent all play a role, the most impactful qualities and habits of top field leaders are not innate — they're learned. The instructor in this session will explore the proven methods, mindsets, and daily practices that define the industry's best foremen, general foremen, and superintendents. Among the items to be discussed are the following: Servant Leadership methods, planning habits, relationship building, communication abilities, documentation practices, coaching, mentoring, teaching, continuous learning and improvement, self-awareness, and self-discipline. Attendees will walk away with practical, teachable skills that, when paired with the right attitude and drive, can elevate any field leader from good to great.

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



## Delegation Essentials: From Overload to Efficiency

**A&J TRAINING CENTER – EL MONTE**

**Eric Herdman**

**Friday, August 8, 2025**

**7:00 a.m. – 2:00 p.m.**

**Members: Free**

**Non-Members: \$179**

The primary goal of this workshop is to enhance productivity and team efficiency while nurturing team members' growth. Tips on how to delegate effectively, ways to improve time management and personal accountability through appropriate delegation, and communication skills to improve the efficiency of delegation will all be reviewed during the training session. Participants will leave this training with the skills to delegate tasks confidently, foster team growth, and free up valuable time to focus on higher-level responsibilities, ultimately contributing to organizational success.

Your curriculum will incorporate:

- Understanding the importance of delegation
- Selecting the right team members for delegation
- Delegation techniques and strategies
- Overcoming barriers to delegation
- Monitoring progress and providing feedback
- Handling delegation challenges and mistakes
- Increasing focus and decreasing distractions to improve the productivity of the team
- Monitoring progress without micromanaging
- Providing constructive feedback
- How to make your message clear, concise, and understood
- Building trust and psychological safety
- Understanding different communication styles
- Ways to deliver effective feedback

By the end of this workshop, participants will understand how to use delegation to boost productivity, foster team development, and achieve better results.



# LEADERSHIP AND PROFESSIONAL DEVELOPMENT SKILLS CONTINUED

## Taking Flight with DISC

**CPMCA TRAINING ROOM – TUSTIN**

**Lisa Austin**

**Friday, September 5, 2025**

**7:00 a.m. – 2:00 p.m.**

**Members: Free**


**Non-Members: \$179**

The Taking Flight with DISC training program is a refreshing, reimagined approach to traditional personality styles workshops. The program is built around four key concepts: self-awareness, social awareness, flexibility and culture. While the most self-aware people are the most successful people, those who can read others and adapt to meet their needs are even more so. This session teaches the DISC styles so individuals can develop new ways of treating others while being true to themselves.

Participants will discover how they unconsciously impose their style on others and sometimes even try to change the people around them because after all, “my way is the right way.” The exercises and discussions help them understand the needs, tendencies, motivators and fears of the people in their lives. We then channel that awareness into action by providing the skills to flexibly adapt to others by anticipating their needs and displaying the right behavior at the right time. Participants will also learn how to apply the four styles to improving team dynamics and organizational culture.

The Taking Flight with DISC Session will help participants to:

- Deeply understand their own style through the Taking Flight with DISC profile
- Quickly read the styles of others and instantly flex to meet their needs
- Tap into their natural gifts to capitalize on their strengths
- Avoid overusing their strengths so they don't become liabilities
- Infuse the four styles into their organizational culture so they are used every day
- Build stronger relationships, communicate more effectively, become empowering leaders, and co-create a more engaging and productive work environment



**Leadership is the  
capacity to translate  
vision into reality.**

## Advanced Leadership Skills for Middle Managers

### CPMCA TRAINING ROOM – TUSTIN

Rosemary Laack

Wednesday, October 29, 2025

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$179

Transitioning from a skilled worker to an effective leader in any industry requires a deep understanding of technical expertise and people management. This course is tailored for managers who have mastered basic supervisory skills and are ready to expand their leadership impact.

Participants will explore effective leadership techniques, change management, and communication skills. Through case studies and practical exercises, attendees will gain the tools to drive team performance, navigate change, and contribute significantly to organizational success.

Upon completing this course, participants will have a robust understanding of their roles as middle managers and be equipped with practical skills to lead teams effectively, communicate feedback, and drive positive change within their organizations.

Who should attend?

- Experienced managers or supervisors looking to enhance their leadership effectiveness.
- HR professionals supporting supervisors or managers
- Emerging leaders looking to build skills for the future



# LEADERSHIP AND PROFESSIONAL DEVELOPMENT SKILLS CONTINUED

## Change Management: Being a Leader of Change

**A&J TRAINING CENTER – SANTEE**

**Dianne Young**

**Thursday, November 6, 2025**

**7:00 a.m. – 2:00 p.m.**

**Members: Free**

**Non-Members: \$179**

### Master the Art of Leading and Adapting to Organizational Change

Change is constant, but how you handle it makes all the difference! This practical and engaging course equips professionals at all levels with the skills to navigate, lead, and thrive during organizational transitions. Whether you're driving change or adapting to it, you'll explore proven change models, effective communication strategies, and techniques to engage and motivate teams.

Through interactive discussions, real-world scenarios, and hands-on activities, you'll gain the confidence to turn uncertainty into opportunity. Learn how to manage resistance, build a culture of adaptability, and ensure smooth transitions that benefit both employees and the organization.

#### Key Topics:

- Understanding the psychology of change and overcoming resistance
- Popular change models: Kotter's 8-Step Process, ADKAR, and Lewin's Change Theory
- Effective communication strategies to drive buy-in and reduce pushback
- The role of leadership in guiding teams through uncertainty
- Building resilience and maintaining motivation during transitions

By the end of this course, you will be able to:

- Implement change models to guide teams through transitions effectively
- Communicate change initiatives clearly and confidently to gain support
- Engage employees by fostering adaptability, trust, and collaboration

Change is inevitable – master it before it masters you!



## Fundamentals of Project Engineering in the Construction Industry

A&J TRAINING CENTER – EL MONTE

**Harry Bederian**

**Friday, October 17, 2025**

**7:00 a.m. – 2:00 p.m.**

**Member: Free**

**Non-Member: \$179**

This seminar offers a comprehensive and practical overview of project engineering in the construction industry, catering to individuals who are either transitioning to the role of a Project Engineer or seeking to broaden their understanding of the responsibilities and scope of this position. The seminar aims to equip participants with the necessary skills and knowledge to effectively bridge the gap between engineering and construction management, a crucial aspect of the Project Engineer role. Through the seminar, attendees will acquire the fundamental principles and techniques needed to successfully navigate this critical function.

Topics covered include:

- The role/duty of a Project Engineer
- Request for Information
- Submittals
- Specifications
- Meetings/Meeting Minutes
- Scheduling and Earn Value Management
- Types of training/certificates
- Construction Technology
- Introduction to Quality

Learning Objectives

- After finishing this course, attendees will comprehend fundamental tasks and roles encountered by field and project engineers that aid their construction teams in accomplishing projects.
- They will understand how RFIs, Submittals, Meeting Minutes, Document control, and specifications can play a critical role in a project's success or failure.
- This course will lay the foundation for attendees to have conversations with experienced team members, expand the attendees understanding of construction practices, and give attendees a road map to take a deeper dive, on their own, in all the topics covered through this course.

# PROJECT MANAGEMENT

## Project Management 4: Essential People Management Skills and Communication Skills

### VIRTUAL

### Project Management Academy

John Koontz

Thursday, July 10, 2025

7:00 a.m. – 10:30 a.m.

Member: Free

Non-Member: \$179

This class provides mechanical project managers with many of the key interpersonal skills needed to effectively manage both teams and individuals. Attendees will learn practical strategies for communication, conflict resolution, team motivation, relationship development, cooperative learning, collaboration, brainstorming, and performance management. In addition, this session will focus on the importance of developing excellent self-awareness and self-management and will include a brief discussion and understanding of Emotional Intelligence and the DISC Personal Profile as related to successful managing people and relationships.

This session is directed specifically to the role of the Mechanical Project Manager and their unique daily communication challenges. Due to the complexity of the construction process and the numerous people involved in a project's completion, excellent communication skills are required to succeed at project management. When communication problems develop, relationships usually weaken, misunderstandings occur, and project failure is imminent. Excellent communication skills are essential to creating a successful project and a successful career. Communication is always difficult on a construction project and the best project managers know that it's an issue which requires a project manager's constant attention, evaluation, and improvement. In this session the instructor will provide attendees with practical information, methods, and best practices for improving their communication abilities over the duration of their career.

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



## Project Management 5: Profitably Managing Your Subcontractors and Critical Leadership Skills for Project Managers

### VIRTUAL

### Project Management Academy

John Koontz

Thursday, July 17, 2025

7:00 a.m. – 10:30 a.m.

Member: Free

Non-Member: \$179

Subcontractors represent a significant portion of most mechanical contracts, and the performance of your subcontractors is a direct reflection of your own performance in the eyes of an owner, construction manager, or general contractor. The project manager's effective management of subcontractors ensures a successful project that is profitable, completed on time, and completed within budget. When the project manager and foreman properly manage their mechanical subcontractors, mechanical contractor risk is low, customer satisfaction is high, and strong long-term relationships are developed between the mechanical contractor and their subcontractors. This session will provide attendees with an in-depth discussion and explanation of the "top ten" keys to successful subcontractor management.

Strong leadership skills are critical to successful project management. This class equips the Mechanical Project Manager with the critical principles and practices of servant leadership which emphasizes a "people-first" mindset. To have successful projects and a successful career, the project manager must continue to develop these critical servant leadership skills throughout their career. Participants will explore how to inspire teams, foster collaboration, and create trust through excellent leadership. In this session, the instructor will provide guidance on the numerous leadership lessons that are learned by all project managers who have become excellent leaders.

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



### **Scheduling from an MEP Perspective and How to Build a Mechanical Schedule**

#### **A&J TRAINING CENTER – SANTEE**

**Troy Aichele**

**Wednesday, August 27, 2025**

**7:00 a.m. – 2:00 p.m.**

**Member: Free**

**Non-Member: \$179**

#### **Scheduling from an MEP Perspective**

Attendees will benefit from this workshop in learning all the different types of schedules used in construction, their benefits, and challenges along with how to optimize their uses. Best practices will also be discussed using real-life instructor project examples for building, maintaining, and managing them.

Participants will learn the following from this workshop:

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

#### **How to Build a Mechanical Schedule**

This workshop is for Project Managers, Assistant Project Managers, and Estimators looking to learn the basics of one of the most critical tasks in construction for mitigating project risk, protecting your estimate assumptions, as well as estimated crew size, workflow, and productivity: How to build a Mechanical Schedule.

Participants will learn the following from this workshop:

- Top 10 items to extract and track from the Baseline CPM
- The Keys to a successful schedule
- What you need to build a Mechanical Schedule
- The steps in building a Mechanical Schedule:
  - Pre-construction / Pre-Project Planning
  - Estimate breakdown
  - Schedule framework

- Defining and sequencing activities
- Estimating task durations
- Applying logic, relationships, and resources to tasks
- Monitoring, measuring, and managing progress and productivity
- How to identify the Critical Path and analyze a resource loaded schedule
- Practice first-hand manually building (from Pre-Project Planning through Commissioning) a Mechanical Schedule using a case-study project and estimate
- Pull-Planning basics and how to apply towards building a Project Commissioning/Closeout Schedule

## Project Management 6: Contract Basics and Effective Project Documentation: Managing Risk

### CPMCA TRAINING CENTER – TUSTIN

#### Project Management Academy

**John Koontz**

**Friday, September 19, 2025**

**7:00 a.m. – 2:00 p.m.**

**Member: Free**

**Non-Member: \$179**

This workshop offers a practical introduction to construction contracts and is tailored specifically for project managers in mechanical construction with 0–5 years of experience. The session focuses on the terminology, key components, and clauses that directly influence daily project execution, communication, schedule and change management, and risk mitigation. While contracts can be complex and take years to fully master, this course provides a solid foundation in understanding contract types, structure, and critical provisions. Topics include scope definition, contract documents, flow-through clauses, incorporation by reference, schedule requirements, payment terms, change orders, delays, notice obligations, and dispute resolution—all presented in plain language and reinforced with real-world mechanical construction examples. The instructor will also emphasize the importance of building and maintaining strong, professional working relationships with general contractors, construction managers, and owners—while ensuring contract requirements are upheld throughout the project.

This class focuses on the critical role that documentation plays in managing risk, protecting productivity and profitability, and supporting successful project outcomes. Attendees will learn what to document, when to document it, and how to create clear, professional records that fulfill both practical and contractual requirements. The class emphasizes timely cause-and-effect documentation—linking actions, events, and impacts—as a key tool in avoiding disputes, supporting claims, and maintaining control throughout the project. Attendees will also gain a solid understanding of how to identify and comply with documentation requirements found in construction contracts, including notice provisions, recordkeeping expectations, change order management, and communication standards. Topics include RFIs, keeping a journal, change order documentation, delay notices, meeting minutes, daily logs, photographs and videos, and follow-up emails. In addition, the instructor will stress the importance

# PROJECT MANAGEMENT

## CONTINUED

of open and continuous communication between the project manager and the field leader (foreman), ensuring that information from the field is documented accurately and in a timely manner. Through real-world examples and proven best practices, this class will help project managers develop consistent documentation practices that reduce risk, improve communication, maintain positive relationships, and strengthen project execution.

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

### **Basic and Advanced Mechanics Lien**

#### **CPMCA TRAINING CENTER – TUSTIN**

**Scott Holbrook**

**Friday, October 3, 2025**

**7:00 a.m. – 2:00 p.m.**

**Member: Free**

**Non-Member: \$179**

The California Mechanics Lien statutes are powerful collection remedies provided to contractors, subcontractors and suppliers for all construction projects in this state. There are many technical requirements to access these collection tools. This seminar is split into two sessions to cover the full breadth of the statutes in one day.

#### **Basic Mechanics Lien Rights:**

The Basic Mechanics Lien seminar covers an overview of the statutory payment rights (Mechanics Lien, Stop Notice and Payment Bonds) available to contractors and suppliers in California. The focus is on preparing and timely serving a Preliminary Notice which is the prerequisite to perfecting any of the statutory rights. Also learn how to complete and record a Mechanics Lien against the real property. The statutory release forms (Conditional/Unconditional Progress and Final) will also be covered in detail.

#### **Advanced Mechanics Lien Rights:**

The Advanced Mechanics Lien seminar builds on the materials covered in the Basic Mechanics Lien seminar covering more specific scenarios and legal technicalities. The focus of this session is on preparing and serving the Stop Payment Notice and claims against the Payment Bonds available on various construction projects. Also discussed will be the Prompt Payment Statutes imposing penalties for late payments where there is no good faith dispute.

## Project Management 7: Change Order Management and Basic Negotiating Skills

CPMCA TRAINING CENTER – TUSTIN

Project Management Academy

John Koontz

Friday, October 24, 2025

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

This class provides mechanical project managers with the knowledge, tools, and strategies needed to manage change orders effectively – safeguarding profitability, preserving leverage, and maintaining strong customer relationships in an ever-changing project environment. While changes are inevitable, poor change management can quickly erode margins, disrupt efficiency, delay progress, spark disputes, and damage reputations. The instructor will examine the most common causes and types of project changes, emphasizing the critical need to establish a clear baseline of scope, schedule, conditions, and budget at the start of the project. Participants will develop practical skills for identifying change conditions, issuing timely and contract-compliant notices, documenting impacts, and negotiating fair, accurate pricing. This course also covers key contract requirements, the differences between private and government work, and the serious risks of performing T&M work based on direction from unauthorized personnel representing the GC, CM, or Owner. Additionally, the instructor will stress that successful change order management relies heavily on the open and consistent communication between the project manager and the field leader (foreman). To reinforce key lessons, the class will include a short workshop segment where participants will review and discuss several realistic change order scenarios drawn from actual project experiences.

Mechanical project managers are constantly negotiating—whether it's about schedule changes, manpower, scope, pricing, contracts, purchasing, or change orders. These daily conversations with owners, CMs, GCs, subcontractors, vendors, and field leaders directly impact project outcomes, yet most PMs have never received formal training in negotiation. Great negotiators aren't handed their skills at birth—they develop them through improved self-awareness, practice, and learning from their mistakes. This course provides foundational negotiation skills tailored to the real-world challenges faced by mechanical PMs. Attendees will learn how to prepare for negotiations, initiate collaboration, identify negotiating styles, read the other party, manage pricing discussions, make strategic concessions, and protect their position without damaging relationships. The class also focuses on improving communication through better questioning, active listening, and building trust-based relationships. To reinforce key negotiating techniques, participants will engage in interactive role-playing exercises, where they'll practice negotiating several realistic project scenarios with guidance and feedback from the instructor.

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

# PROJECT MANAGEMENT

CONTINUED

## Project Management 8: Practical Time Management Skills and Best Practices of the Industry's Best PM's

**CPMCA TRAINING CENTER – TUSTIN**

**Project Management Academy**

**John Koontz**

**Thursday, November 20, 2025**

**7:00 a.m. – 2:00 p.m.**

**Member: Free**

**Non-Member: \$179**

Project management in mechanical construction is a dynamic, high-pressure profession that presents constant time management challenges. The fast pace, constant demands, and competing priorities can create daily chaos for the project manager—chaos that must be managed effectively to maintain field productivity, reduce stress, improve customer relationships, and create work-life harmony. Effective and efficient time managers—especially those who can successfully oversee multiple active projects—are among the most valuable PMs in any mechanical contracting firm. In this session, the instructor will share specific, proven methods and practices that help project managers improve both their efficiency and overall professional effectiveness. Topics covered will include time ownership and the importance of valuing, guarding, and protecting your time, as well as strategies for managing interruptions, handling visitors, and learning when and how to say yes or no. The session will explore the power of SMART goal setting and how to become more calendar-driven, priority-driven, and list-driven in your daily routines. Project managers will also learn the value of effective delegation, how to take control of meetings, phone calls, and email, and how to carve out quiet time to focus on high-priority tasks. A strong emphasis will be placed on the importance of each attendee creating their own personal, dynamic, and repeatable time management system that works.

Why are some mechanical project managers consistently more successful than their peers? What separates a good project manager from a truly great one? While experience, attitude, and natural ability all play a role, the most impactful qualities and habits of top-performing project managers are not innate—they're learned, practiced, and refined over time. This session explores the best practices, mindsets, and daily disciplines that define the industry's most effective and respected project managers. The instructor will provide a focused, experience-based overview of the proven strategies used by high-performing PMs to lead teams, manage risk, maintain profitability, and deliver consistent project success. Participants will also examine the traits and personal qualities most found in exceptional PMs—such as self-awareness, discipline, planning ability, communication skills, leadership approach, and a commitment to continuous improvement. Attendees will leave with a deeper understanding of what the best PMs do differently—and how those skills and habits can be developed by any project manager who brings the right mindset, drive, and commitment to growth.

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

## Billings and Cashflow and Job Cost, Labor Control and Post-Job Reviews

### CPMCA TRAINING ROOM – TUSTIN

**Troy Aichele**

**Wednesday, December 10, 2025**

**7:00 a.m. – 2:00 p.m.**

**Member: Free**

**Non-Member: \$179**

#### Billings and Cash Flow

Cash will always be King in construction, and it only comes from one place: Billings. Project Managers must understand the importance of cashflow, where it comes from, the ramifications of not having it, and best practices in managing the process to best benefit the company.

Participants will learn the following from this workshop:

- The fundamentals of billings and cashflow:
- Include ALL projected costs
  - Managing when major costs hit the job during the month
  - Importance of billing on time
  - Strategies for building (and selling) a front-loaded Schedule of Values (SOV)
- The definitions and differences between over/under-billing and over/under-cashed
- Top reasons an Owner or General Contractor may withhold money from progress payments and how to avoid

#### Job Cost, Labor Control, and Post-Job Reviews

Effective Job Cost and Labor Control are the most important jobs a Project Manager has on a project. While platforms in tracking this data continue to change with technology, knowing what to track, how to track it and best practices on identification, mitigation and management remain constant.

Once the project is over, breaking down post-project cost and productivity data is one of the most overlooked tasks in our industry. It is also one of the most beneficial when performed diligently and accurately.

Participants will learn the following from this workshop:

- The importance of the job cost report and tried and true methods for analyzing monthly
- The daily work activity breakdown between direct installation, indirect operations, material handling, and ineffective activities
- The financial impact of adding (or losing) 30 minutes a day of direct installation every day on the jobsite
- Best practices for measuring and managing field productivity
- Factors that improve labor productivity and strategies and tactics for identification and implementation
- The importance of post job reviews and best practices in creating a useful post job review meeting
- Tips for optimizing the benefits of performing the post-job review
- How to use post-job review information for future estimates and rough order of magnitudes (ROM's)

# SERVICE/TECHNICAL TRAININGS

## HVAC 101 for Non-Technical Employees

### CPMCA TRAINING ROOM – TUSTIN

**Brad Perkins**

**Friday, December 5, 2025**

**7:00 a.m. – 2:00 p.m.**

**Member: Free**

**Non-Member: \$179**

This seminar offers an introduction to HVAC (Heating, Ventilation, and Air Conditioning) systems, focusing on their importance in creating an optimal environment for building occupants. Key topics include system design principles, mechanical equipment, piping materials, and construction requirements. Participants will examine plans and specifications used in project illustrations and learn about the commissioning process.

#### Learning Objectives:

- Define basic HVAC industry terminology.
- Recognize different HVAC equipment and systems and understand their functions.
- Describe common heating methods for rooms or facilities.
- Identify fundamental components of air conditioning systems.



## 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 Construction *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)**

# CERTIFIED SAFETY – SAFETY RISK CONTROL

CONTINUED

## 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](http://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.**

