



Mechanical Construction Education Alliance (MCEA)

Training Catalog July – December 2026

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

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Executive Director's Message

CPMCA's **Mechanical Construction Education Alliance (MCEA)** is proud to present our membership with the 26th 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.

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.

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CPMCA's Field Leadership Academy and Project Management Academy

The **Field Leadership Academy** and **The Project Management Academy** are 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.

Certification note: Classes completed since the inception of the program will count toward certification.



July			
15	Growing and Developing Foremen	2	Project Management 8: Effective Project Documentation: Managing Risk #
22 - 23	Introduction to AI (2-Session class)	7	Suicide Prevention VitalCog/ Mental Health First Aid
30	Project Management 6: Profitably Managing Your Subcontractors/ Communication Skills-The PM's Most Powerful Tool *#	8	Microsoft Excel 2019 – Part 3 *
		9	Bluebeam Intermediate *
August		22	HVAC 101 for Non-Technical Employees
7	Understanding Challenging Communication Types	23	Plumbing 101 for Non-Technical Employees
13	Elevated Leadership	29	Foreman Training 6: Essential People Management Skills For Field Leaders †
21	Microsoft Excel 2019 – Part 1 *	30	Project Management 9: Change Order Management: Best Practices #
27	Foreman Training 4: Practical Time Management Skills For Field Leaders †		
28	Project Management 7: Contract Basics: Using the Contract as a PM Tool #	November	
		6	Bluebeam Advanced *
September		12	AI for Project Managers
11	Bluebeam Beginner *	12	AI for HR & Administrators
18	Microsoft Excel 2019 – Part 2 *	December	
30	Strategic Negotiation Workshop: Negotiating Techniques for Project Managers	4	Collaboration Skills at Work
			* Virtual Training
October			† Field Leadership Academy
1	Foreman Training 5: Project Documentation: The Field Leaders Role / Managing Our Subcontractors – The Field Leaders Role †		# Project Management Academy

Journeymen Upgrade Training

All CPMCA trainings listed in this course guide are approved and will count toward the Journeymen 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 Alyson@cpmca.org.

Computer Skills and Technology

- Bluebeam BEGINNER *
Friday, September 11, 2026
- Bluebeam INTERMEDIATE *
Friday, October 9, 2026
- Bluebeam ADVANCED *
Friday, November 6, 2026
- Microsoft Excel 2019 – Part 1 *
Friday, August 21, 2026
- Microsoft Excel 2019 – Part 2 *
Friday, September 18, 2026
- Microsoft Excel 2019 – Part 3 *
Thursday, October 8, 2026
- AI for Project Managers
Thursday, November 12, 2026
- AI for HR & Administrators
Thursday, November 12, 2026

Foreman Training

- Growing and Developing Foremen
Wednesday, July 15, 2026
- Foreman Training 4: Practical Time Management Skills For Field Leaders †
Thursday, August 27, 2026
- Foreman Training 5: Project Documentation: The Field Leaders Role/ Managing Our Subcontractors – The Field Leaders Role †
Thursday, October 1, 2026
- Foreman Training 6: Essential People Management Skills for Field Leaders †
Thursday, October 29, 2026

Leadership and Professional Development Skills

- Understanding Challenging Communication Types
Friday, August 7, 2026
- Elevated Leadership
Thursday, August 13, 2026
- Collaboration Skills at Work
Friday, December 4, 2026

Project Management

- Project Management 6: Profitably Managing Your Subcontractors/Communication Skills – The PM's Most Powerful Tool *#
Thursday, July 30, 2026
- Project Management 7: Contract Basics: Using the Contract as a PM Tool #
Friday, August 28, 2026
- Project Management 8: Effective Project Documentation: Managing Risk #
Friday, October 2, 2026
- Project Management 9: Change Order Management: Best Practices #
Friday, October 30, 2026
- Strategic Negotiation Workshop: Negotiating Techniques for Project Managers
Wednesday, September 30, 2026

Service/Technical Trainings

- HVAC 101 for Non-Technical Employees
Thursday, October 22, 2026
- Plumbing 101 for Non-Technical Employees
Friday, October 23, 2026

Safety

- Suicide Prevention VitalCog/Mental Health First Aid
Wednesday, October 7, 2026

* Virtual Training

† Field Leadership Academy

Project Management Academy



Plan Accordingly! Take note of these important MCAA Events:

- AEC Best Practices Conference – Sonoma, CA
- Fabrication Conference – Baltimore, MD
- Field Leaders Conference – Indianapolis, IN
- IPM Class 97, Week 2 – Austin, TX
- IPM Class 98, Week 2 – Austin, TX
- MCAA Great Futures Forum – St. Louis, MO
- Foundations of Field Leadership, Course 14 (Virtual)
- ALI Course 26, Week 1 – Chapel Hill, NC
- UA/MCAA Mental Health Summit – Washington, DC
- IPM Class 99, Week 1 – Austin, TX
- IPM Class 100, Week 1 – Austin, TX
- MSCA Annual Education Conference – Austin, TX
- ALI Course 26, Week 2 – Chapel Hill, NC
- Industry Funds Conference – Long Boat Key, FL

- July 27 – July 29, 2026
- September 15 – September 17, 2026
- September 16 – September 18, 2026
- September 20 – September 24, 2026
- September 21 – September 25, 2026
- September 24 – September 26, 2026
- September 24 – November 12, 2026
- September 27 – September 30, 2026
- October 18 – October 21, 2026
- October 18 – October 22, 2026
- October 19 – October 23, 2026
- November 8 – November 11, 2026
- November 15 – November 19, 2026
- December 2 – December 4, 2026

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





Chris Carr, founder and CEO of Farotech and Dynamix.ai, has been a leader in digital marketing since 2001. With the rise of AI, Chris has positioned Dynamix.ai at the forefront of emerging AI technologies. That's why this workshop was created. It's 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 holds a certification in Generative AI for Business Transformation from MIT and is completing an AI for Business certification at Wharton School of Business. Chris presents his AI workshop to businesses nationwide, helping companies understand and prepare for the future of AI that is already here.



Kevin L. Dougherty has been speaking to the construction industry. Kevin represents a changing industry – aggressive, realistic, and open-minded. Kevin's work and education experience enables him to relate to today's problems and provides tangible solutions in an easy-to-listen style. He has taught thousands of people in various seminars. His client base ranges from family-owned businesses to corporate conglomerates. In addition to speaking and writing articles, Kevin has served as, foreman, Journeyman, sales manager, project manager, corporate trainer, partner for a multimillion-dollar specialty services contractor. Kevin's ability to entertain

audiences and hold their interest while getting his message across consistently makes him one of the industries top speaking and training talents.



Eric Herdman is an accomplished speaker, business leader, coach, and facilitator with over 30 years of instruction experience. His clients include many departments and branches of the U.S. Government, financial institutions, national associations, and corporate multibillion dollar organizations. He has authored several books and started companies from the ground up. Eric loves to entertain, engage, educate, and inform audiences into action and has the style, knowledge, and leadership to give your team long-lasting, positive results. Whether you are looking to strategically position your business, develop your leadership team, connect, and communicate with your staff

and customers, or optimize your performance and productivity, Eric will deliver top-level success. Eric has developed proven leadership techniques and created the Time, Energy, Focus system to improve individual productivity. He provides new methods to approach everyday problems that can be immediately implemented into practice turning obstacles into opportunities.



Omar Galindo is a proud Marine Corps Veteran with a strong commitment to service and leadership. Currently serving as the Business Agent and Apprenticeship Coordinator for Local 78 in Los Angeles, Omar plays a key role in workforce development and union advocacy. As the UA Pipe PALS Advisory Committee Chair, Omar promotes mentorship and support within the industry. Additionally, Omar serves as a Vital Cog Master Trainer and ASIST (Applied Suicide Intervention Training) Trainer. He has been deeply involved with the Mental Health Awareness courses offered by the United Association, demonstrating a passion for improving mental well-being across the trade community.



John R. Koontz has over four decades of wide-ranging mechanical industry experience that includes contracting, academics, and consulting. He is 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". 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. 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.



Rebecca Medaris is the Director of Risk at Pan-Pacific Mechanical. Rebecca's safety team is trained in Mental Health First Aid and they support the physical and mental safety of nearly 1,200 employees in three states. Mental health is a topic near to Rebecca's heart and she believes opening the door for conversations is the best way an employer can start to support the mental health of its employees. Rebecca is the chairperson for the CPMCA Safety Committee and the Vice Chair of the MCAA Safety Committee. She has been at Pan-Pacific for 20+ years, and she loves her job and the people she works with. Rebecca is a wealth of knowledge, and it is always a risk to ask her a 5-minute question...you might get a 20-minute answer.



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



Dianne Young is a seasoned trainer, facilitator, and business coach with over 25 years of experience working with leaders at all levels of management. An entrepreneur since college, she has founded more than a dozen successful companies and is known for her dynamic, proactive approach to leadership and professional development. Formerly an educator with Dale Carnegie Training, Dianne went on to lead her own business coaching firm, helping organizations exceed goals by maximizing existing strengths and resources. She has trained and coached thousands of professionals across industries including healthcare, government, technology, finance, education,

manufacturing, and nonprofit sectors. A sought-after keynote speaker, Dianne regularly presents leadership and women's conferences nationwide. Her current focus includes leadership effectiveness, communication, and navigating generational differences in the workplace. Known for her ability to inspire growth and action, she empowers individuals and teams to collaborate more effectively and achieve lasting success. Expertise & Credentials include: leadership development, communication strategies, change management, conflict resolution, emotional intelligence, DiSC assessments, sales and customer service, and performance management. She is a Certified Speaking Professional, Master Level Business Coach, and certified trainer and coach, with academic backgrounds from the University of Northern Iowa and the University of Iowa.

Bluebeam – BEGINNER

VIRTUAL

Christopher Suggs

Friday, September 11, 2026

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 9, 2026

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 6, 2026****7:00 a.m. – 2:30 p.m.****Member: Free****Non-Member: \$299**

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

Revu 20 (Standard, CAD, eXtreme)**Revu 21 (Core, Complete)**

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

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

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

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

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

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

**Microsoft Excel 2019 – Part 1****VIRTUAL****New Horizons Computer Learning Center****Friday, August 21, 2026****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 are 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****Friday, September 18, 2026****8:00 a.m. – 4:00 p.m.****Member: Free****Non-Member: \$299**

This course builds upon the foundational knowledge presented in the Microsoft® Office Excel® 2019: Part 1 course and will help start you down the road to creating advanced workbooks and worksheets that can help deepen your understanding of organizational intelligence. This course is designed for students who already have foundational knowledge and skills in Excel 2019 and who wish to begin taking advantage of some of the higher-level functionality in Excel to analyze and present data. To ensure success, students should have completed Microsoft® Office Excel® 2019: Part 1 or have the equivalent knowledge and experience. The ability to analyze massive amounts of data, extract actionable information from it, and present that information to decision makers is at the foundation of a successful organization that is able to compete at a high level. Upon successful completion of this course, you will be able to leverage the power of data analysis and presentation in order to make informed, intelligent organizational decisions. You will: Work with functions. Work with lists. Analyze data. Visualize data with charts. Use PivotTables and PivotCharts. The final stop, Excel 2019 Part 3 is just around the corner!

Microsoft Excel 2019 – Part 3

VIRTUAL

New Horizons Computer Learning Center

Thursday, October 8, 2026

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.



Introduction to AI

CPMCA TRAINING ROOM – TUSTIN

Chris Carr

Wednesday & Thursday, July 22 – 23, 2026

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$229 per day

Registrants are expected to attend both days, as course content builds sequentially. Due to high demand, a no-show fee will be charged if you fail to attend either session

The goal of this class is to equip your team and C-level executives with the skills to effectively utilize AI, transforming it from a mere tool into a driver of efficiency, quality, and creativity. This 2-session intensive course is broken down as follows:

This course offers practical, hands-on training to master AI tools, ensuring your team not only understands AI's capabilities but also leads in its application, giving your company a competitive edge in an AI-driven business landscape.

Part of this training is a workshop that fuses theoretical learning with practical application. Participants engage with AI tools in small group exercises to directly apply learned concepts. This approach ensures a comprehensive, hands-on experience.

Day One Agenda

- Welcome & State of AI
- Tour of ChatGPT & CoPilot Interface
- AI Safety / Best Practices
- Task Master Assignment
- Projects Lecture & Demo
- Projects Exercise
- Custom GPT Lecture & Demo
- Custom GPT Exercise
- Standard Operating Procedures

Day Two Agenda

- Open Q&A from Day 1
- Gen AI Images (Ice Breaker)
- Downloads
- Prompt Engineering 101
- Hand Written Notes
- Deep Research Lecture
- Deep Research Exercise
- Gamma / Deep Research
- ChatGPT Connectors / MCP
- Memory & Frameworks
- Advanced Prompting – Rating and Scoring
- How to Prevent Misinformation & Hallucinations

AI For Project Managers

CPMCA TRAINING ROOM #1 – TUSTIN

Chris Carr

November 12, 2026

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$229

Specialized AI training for Estimators and Project Managers enhances accuracy in project estimation, boosts operational efficiency, and optimizes project management practices.

This course will cover:

- AI-powered analysis for identifying schedule delays and conflicts
- Forecasting workforce needs using AI-driven labor modeling
- AI-assisted tracking of material lead times and procurement delays
- Smart takeoffs and estimating with historical labor and material cost benchmarks
- Predictive budgeting and early detection of cost overruns
- Contract review with AI for risk clauses and change orders
- Change order comparison with cost impact summaries
- AI-enhanced submittal and RFI workflows
- Consistent generation of reports and documentation using AI

AI for HR & Administrators

CPMCA TRAINING ROOM #2 – TUSTIN

Chris Carr

November 12, 2026

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$229

This program, AI for Administration & HR 101: Practical Foundations, is designed to equip HR and administrative professionals with the knowledge and tools needed to confidently integrate artificial intelligence into their daily work and long-term strategy.

This course will cover:

- Strategic AI Foundations for HR
- Risk, Governance & Responsible Adoption
- AI-Enabled Talent Strategy
- Practical HR Productivity Gains
- Workforce & Organizational Transformation
- Hands-On Implementation Roadmap

Growing and Developing Foremen

CPMCA TRAINING ROOM – TUSTIN

Field Leadership Academy

Kevin Dougherty

Wednesday, July 15, 2026

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

Looking for the perfect supervisor? Maybe you don't need to look very far... If you want to develop men and women into managers, or perhaps want to work on your own supervisory skills, this seminar can help. Geared towards anyone who manages people, including foremen, owners, and project managers, this real world presentation has been used to train over 10,000 supervisors in leadership, transition to management, problem solving, and ending communication conflict.

Foreman Training 4: Practical Time Management Skills for Field Leaders

CPMCA TRAINING ROOM – TUSTIN

Field Leadership Academy

John Koontz

Thursday, August 27, 2026

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

The effective management of their own time is one of a Field Leaders 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. Great time management is always difficult for a Field Leader...but it's not impossible. The most effective Field Leaders have learned the tricks, methods, techniques, and habits that must be put in place and then constantly improved upon to ensure the most efficient and effective usage of their time. In this session, the instructor will cover many specific methods and practices for improving the efficiency and the overall effectiveness of a Field Leader. Among the topics to be discussed and examined are the following: time ownership (valuing, guarding, protecting), managing visitors, knowing how and when to say yes or no, setting smart goals, calendar driven, priority driven, list driven, effective delegation, meeting management, quiet hour, phone management, email management, and creating your own personal system.

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

Foreman Training 5: Project Documentation: The Field Leaders Role/ Managing Our Subcontractors – The Field Leaders Role

CPMCA TRAINING ROOM – TUSTIN

Field Leadership Academy

John Koontz

Thursday, October 1, 2026

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.

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 leaders 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 6: Essential People Management Skills for Field Leaders

CPMCA TRAINING ROOM – TUSTIN

Field Leadership Academy

John Koontz

Thursday, October 29, 2026

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 that “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.

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



Understanding Challenging Communication Types

CPMCA TRAINING ROOM – TUSTIN

Eric Herdman

Friday, August 7, 2026

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

Communication challenges are inevitable – and without the right skills, they cost time, trust and results.

This workshop helps leaders, colleagues and teams decode the communication behaviors that often disrupt clarity and collaboration in the workplace. Participants will explore common communication styles and behaviors that can make conversations difficult, while gaining insight into their own natural communication tendencies and triggers.

This course equips participants with practical tools to communicate clearly, calmly and effectively – even in difficult situations – turning communication challenges into opportunities for connection and progress. Attendees will leave with a sharper toolkit for communication with precision, empathy, and influence-skills every high-performing professional needs to communicate effectively in the modern workplace.

This 6-hour workshop delivers a comprehensive deep dive across all six communicator types.

Module 1: THE GENERATIONAL CONTEXT COMMUNICATOR

Module 2: THE EMOTIONALLY INTELLIGENT (OR NOT) COMMUNICATOR

Module 3: THE TECHNICAL-TO-NONTECHNICAL COMMUNICATOR

Module 4: THE INFORMATION-OVERLOAD COMMUNICATOR

Module 5: THE POOR MESSAGE CLARITY AND CONCISENESS COMMUNICATOR

Module 6: THE PASSIVE COMMUNICATOR.

If you're looking to improve communication, reduce tension, and strengthen collaboration within your team, then this workshop is for you. Clear communication isn't accidental. It's intentional.



Elevated Leadership

CPMCA TRAINING ROOM – TUSTIN

Rosemary Laack

Thursday, August 13, 2026

7:00 a.m. – 2:00 p.m.

Members: Free

Non-Member: \$179

As leaders take on more responsibility, the challenge shifts. Success is no longer defined by technical expertise alone, but by the ability to lead people effectively. Leaders are expected to communicate clearly, adjust their approach to individuals and situations, delegate tasks in ways that develop skills, and keep teams aligned under pressure.

Many leaders are promoted because of what they know. This course focuses on how they lead in real-world conditions.

Participants will focus on the practical leadership behaviors that drive team performance. Through practical scenarios and applied exercises, they will build skills they can use immediately to improve team coordination, communication, and performance.

By the end of the course, participants will be able to:

- Adapt their leadership approach to different individuals and situations
- Communicate expectations and feedback with greater clarity and impact
- Delegate work more effectively while developing team capability
- Strengthen coordination and consistency across teams
- Lead with greater confidence in day-to-day operation

Collaboration Skills at Work

CPMCA TRAINING ROOM – TUSTIN

Dianne Young

Friday, December 4, 2026

7:00 a.m. - 2:00 p.m.

Members: Free

Non-Member: \$179

Effective collaboration is essential for organizational success. This course helps participants develop the skills needed to work productively with others, build trust, and achieve shared goals. Participants will learn how to communicate effectively, navigate team dynamics, and leverage diverse perspectives to improve outcomes. Includes: Key principles of effective teamwork and collaboration, Techniques for improving communication within teams, Strategies for resolving conflict and building trust, How to leverage diverse perspectives for better results.

**Project Management 6: Profitably Managing your Subcontractors/
Communication Skills – The PM's Most Powerful Tool****VIRTUAL****Project Management Academy****John Koontz****Thursday, July 30, 2026****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.

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 7: Contract Basics: Using the Contract as a PM Tool**CPMCA TRAINING ROOM - TUSTIN****Project Management Academy****John Koontz****Friday, August 28, 2026****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.

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

Project Management 8: Effective Project Documentation: Managing Risk**CPMCA TRAINING ROOM - TUSTIN****Project Management Academy****John Koontz****Friday, October 2, 2026****7:00 a.m. – 2:00 p.m.****Member: Free****Non-Member: \$179**

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 of open and continuous communication between the project manager and the field leader (foreman), ensuring that information from the field

is documented accurately and timely. 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.

Project Management 9: Change Order Management: Best Practices

CPMCA TRAINING ROOM - TUSTIN

Project Management Academy

John Koontz

Friday, October 30, 2026

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.

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

CPMCA TRAINING ROOM - TUSTIN

John Koontz

Wednesday, September 30, 2026

7:00 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

Who should attend: This course is intended for experienced Project Managers with more than 5 years of experience.

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.



HVAC 101 for Non-Technical Employees**CPMCA TRAINING ROOM - TUSTIN****Brad Perkins****Thursday, October 22, 2026****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.

Plumbing 101 for Non-Technical Employees**CPMCA TRAINING ROOM - TUSTIN****Brad Perkins****Friday, October 23, 2026****7:00 a.m. – 2:00 p.m.****Member: Free****Non-Member: \$179**

This introductory course provides a practical overview of plumbing systems commonly used in mechanical construction, designed specifically for non-technical professionals seeking a clearer understanding of how these systems function and are applied in the field.

Participants will explore the fundamentals of domestic water distribution, including pipe sizing, system layout, and key components such as backflow preventers, booster pumps, and pressure considerations. The course will also cover sanitary systems, including pipe sizing, slope requirements, and the role of lift stations in effective wastewater management.

In addition, attendees will gain insight into specialized systems and equipment such as oil and sand interceptors, grease traps, and kitchen plumbing systems. The training will also introduce core concepts related to hydronic systems, including primary and secondary distribution for chilled water and boiler systems, as well as pump operation, pump curves, and cavitation.

The course will further examine water heating technologies, including traditional, tankless, and condensing water heaters, with an emphasis on system layout for energy efficiency. Important safety and performance considerations—such as hot water delivery temperatures, scalding prevention, and Legionella risk—will also be discussed, along with the role of hot water recirculation systems. By the end of the course, participants will have a well-rounded foundational understanding of plumbing systems, enabling them to better interpret plans, communicate with technical teams, and contribute more effectively to project discussions.

Suicide Prevention VitalCog/Mental Health First Aid**CPMCA TRAINING ROOM – TUSTIN****Omar Galindo/Rebecca Medaris****Wednesday, October 7, 2026****7:00 a.m. – 2:00 p.m.****Member: Free****Non-Member: \$179**

This combined training integrates VitalCog's proactive approach to suicide prevention with the practical skills of Mental Health First Aid, equipping participants to recognize and respond to mental health challenges in the workplace. VitalCog focuses on identifying early warning signs of suicide and promoting a culture of awareness, early intervention, and support. Just as organizations work to reduce physical health risks through prevention, this training emphasizes how promoting mental health and encouraging early action can help reduce suicide in the workplace. Participants will engage in meaningful dialogue around mental health challenges, strengthening their ability to recognize risk factors and take appropriate action. Building on this foundation, the Mental Health First Aid component provides practical, hands-on tools to respond effectively when someone is experiencing a mental health concern or crisis. Similar to traditional first aid, participants will learn how to assess situations, approach individuals with care, listen without judgment, and connect them to appropriate resources and professional support. By combining awareness with action, this training builds confidence in addressing sensitive situations calmly and effectively. Participants will leave with a deeper understanding of workplace mental health, along with the skills needed to support others, encourage help-seeking, and contribute to a safer, more supportive work environment.

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)**



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**
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