



CPMCA

California Plumbing & Mechanical
Contractors Association

Seminar Catalog

**January–June
2021**

**Computer Skills & Technology • Management • Project Management
Foreman Training • People Management/Skills • Sales/Service/Safety
Certified Safety – Safety Risk Control • Webcasts**

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CPMCA Executive Committee, Board of Directors

Executive Committee – 2020/2021

Jay Lusita, President

Tier One Plumbing

Jay Chase, Vice President

Muir-Chase Plumbing Co., Inc.

John Feikema, Secretary

California Spectra, Inc.

Jim DeFlavio, Treasurer

Murray Company

Steve Cornelius, Past President

University Mechanical & Engineering

Contractors – San Diego

CPMCA Board of Directors

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ARB, Inc.

Matt Cunningham

Jackson and Blanc

Pete Fortin

ACCO Engineered Systems

Jason Gordon

Xcel Mechanical Systems, Inc.

Mark Magnuson

Murray Company

John Modjeski

University Mechanical & Engineering

Contractors – San Diego

Ed Newville

Southland Industries

Bryan Suttles

Suttles Plumbing & Mechanical Corporation

Michael Teague

Schultz Industrial Services, Inc.

Larry Verne

Verne's Plumbing, Inc.

Education Committee

Harry Bederian – Chairperson

ARB, Inc.

Shaabini Alford

Murray Company

Travis Craven

ACCO Engineered Systems

Jason Gordon

Xcel Mechanical Systems, Inc.

Beni Monaco

All Area Services, Inc.

Bryan Suttles

Suttles Plumbing & Mechanical Corporation

CPMCA Staff

Chip Martin

Executive Director

Dana Giambalvo

Office Manager

Michelle Lynn

Director of Education

Letter from the Executive Director



First and foremost, we hope that you and yours are safe and healthy. Last year, COVID-19 brought unprecedented challenges and disruptions to all our lives, both personally and professionally. Throughout, CPMCA remained committed to the health and safety of its membership, transitioning all classes to an online format. Judging by your feedback, virtual classes seemed to be very beneficial to you. Despite the current circumstances, we are optimistically looking forward and will do our best to help you return to a sense of normalcy by serving your educational needs as best we can. We are excited to present you with CPMCA's 15th semi-annual Seminar Catalog (featuring classes January – June 2021). The classes in this course guide have been tentatively scheduled as in-person classes. However, we are also closely tracking the developments of COVID-19. In the case that in-person classes are not ideal, we will transition to online classes. Make sure to get onto our email distribution list, to receive updates and information about our classes (see page 4).

We are excited to offer a few new classes to you. Make sure to check out “Resilience in the Workplace” to learn how to balance work and life or learn how to contribute to your team's success by attending How to Be A Team Player. For the first time, we are excited to offer Workplace Violence with well-known speaker Carol Cambridge at the Stay Safe Project.

Your feedback is important; thus, we strive to structure our classes to meet your needs while also addressing the industry's most relevant and current topics. We hope you find this year's course selection valuable in your personal and professional growth. We encourage you to browse through this brochure and highlight courses that speak to your company, position or department. CPMCA continues to pride itself in offering seminars in many areas of training with one goal in mind; for the overall betterment of our contractors and their workers in Southern California. We welcome you to attend as many seminars as fit your interest and career!

Goal & Guarantee

Our goal is to offer a comprehensive first-in-class educational program unparalleled in the industry which will continue to advance the professional, technical and managerial skills of our member contractors and their employees. If you are not fully satisfied with a particular program, we will gladly provide a full refund.

CPMCA Mission Statement

The mission of CPMCA is to provide representation of its members to enhance their business and profitability through education and labor relations. This Association will provide a partnership for progress between Labor and Management; setting aside differences, to unite in the common goal of expanding the market share of the union mechanical contracting industry.

Vision Statement

CPMCA is the organization of choice, a progressive leader and voice for the union plumbing and mechanical contracting industry in Southern California, providing business opportunities, education, fair employment, honesty, integrity and family values.

SCHEDULE AT A GLANCE BY MONTH

The following is a list of classes offered during the first half of 2021.

February

- 10 Microsoft Excel 2019 – Part 1
- 12-13 Foreman Training 3 & 4
- 18 Microsoft Excel 2019 – Part 2
- 24 Project Managers Impact on Financial Outcomes
- 26-27 Project Management 1 & 2

March

- 10 Microsoft Excel 2019 – Part 3
- 12-13 Foreman Training 5 & 6
- 26-27 Project Management 3 & 4
- 31 Resilience in the Workplace: Balancing Your Work Priorities and Life Responsibilities

April

- 8 Driving Project Success
- 14 Bluebeam BEGINNER
- 16-17 Project Management 5 & 6
- 21 Introduction to California Construction Contracts
- 28 Bluebeam INTERMEDIATE
- 30 Building Bridges Between Generations

May

- 12 Bluebeam ADVANCED
- 13 How to Be a Better Team Player
- 21 Project Engineering Basics in Construction

June

- 3 Crisis at Work: Workplace Violence & Active Shooter

*All classes listed in this course guide are approved and will count toward the Journeyman Upgrade Training Requirement. Please take advantage of these valuable opportunities. Visit www.uniontopics.com/journeyman-training for more information.

**All classes are tentatively scheduled as in-person classes. In the case that due to COVID classes transition to a virtual platform, we will notify you through our email class invitations. If you do not already receive our class emails, please contact michelle@cpmca.org.

How to Register for CPMCA Classes

There are two ways to register:

- 1) Go to www.cpmca.org, hover over the “Education” tab, click on “Course Training Schedule.” You will see a list of classes for which registration is open. Click on “More Details” and then “Website” to view specific information about the class and/or to register online.
- 2) Online invitations are emailed a month before each class date. The invitation will contain specific information about the class (time, location, parking directions, speaker information) as well as links to register online. If you are not on the email distribution list, please email michelle@cpmca.org.

Computer Skills & Technology

- Microsoft Excel 2019 – Part 1
Wednesday, February 10, 2021
- Microsoft Excel 2019 – Part 2
Thursday, February 18, 2021
- Microsoft Excel 2019 – Part 3
Wednesday, March 10, 2021
- Bluebeam BEGINNER
Wednesday, April 14, 2021
- Bluebeam INTERMEDIATE
Wednesday, April 28, 2021
- Bluebeam ADVANCED
Wednesday, May 12, 2021

Foreman

- Foreman Training 3 & 4
Fri. & Sat., February 12-13, 2021
- Foreman Training 5 & 6
Fri. & Sat., March 12-13, 2021

Management

- Project Managers Impact on Financial Outcomes
Wednesday, February 24, 2021
- Resilience in the Workplace: Balancing Your Work Priorities and Life Responsibilities
Wednesday, March 31, 2021
- Introduction to Calif. Construction Contracts
Wednesday, April 21, 2021

Project Management

- Project Management 1 & 2
Fri. & Sat., February 26-27, 2021
- Project Management 3 & 4
Fri. & Sat., March 26-27, 2021
- Driving Project Success
Thursday, April 8, 2021
- Project Management 5 & 6
Fri. & Sat., April 16-17, 2021
- Project Engineering Basics in Construction
Friday, May 21, 2021

People Management

- Building Bridges Between Generations
Friday, April 30, 2021
- How to Be a Better Team Player
Thursday, May 13, 2021

Sales/Service/Safety

- Crisis at Work: Workplace Violence & Active Shooter
Thursday, June 3, 2021

Webcasts

- Active Listening
- BIM 101
- Excel: Excel Solver Procedure
- Excel: Insert Excel Sheet into Word
- Excel: Microsoft Word fill-In Forms
- Excel: Summarizing Data with Subtotals in Excel
- Going Green - Valuable Opportunities for Mechanical Contractors
- Green Building: LEED Certification “So You Want to be a Green Contractor”
- Green Building: LEED Certification and Sustainable Design
- Mechanical Estimating Techniques
- Microsoft Office 2007 Excel
- Microsoft Office 2007 Overview
- PowerPoint: Introduction to PowerPoint 2007
- Retro-Commissioning
- Water Efficiency and How It Relates to Green Building
- Workplace Violence

And many more – please see www.cpmca.org for complete listing

IMPORTANT EVENTS



Plan Accordingly! Take note of these important MCAA Events:

Preparatory Institute for Project Management

January 11 – April 12, 2021

Safety Directors' Conference (Virtual)

January 19-21, 2021

Advanced IPM Class 17 – Austin, TX

January 24-29, 2021

MCAA Technology Conference – Austin, TX

January 27-29, 2021

MCAA Virtual Education Conference

March 22-25, 2021

IPM Class 77, Week 1 – Austin, TX

April 18-22, 2021

IPM Class 78, Week 1 – Austin, TX

April 19-23, 2021

MCAA Fabrication Conference – Des Moines, IA

May 10-12, 2021

Field Leaders Conference – Seattle, WA

May 12-14, 2021

Women in the Mechanical Industry Conference – Austin, TX

June 21-23, 2021

MCAA Contacts:

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

For conference & conventions, contact Melissa Funyak at mfunyak@mcaa.org

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

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

For online webcasts & MSCA, contact Barbara Dolim at bdolim@mcaa.org



Plan Accordingly! Take note of this important CPMCA Event:

**CPMCA Annual Golf Tournament – Newport Beach Country Club,
Newport Beach, CA**

Monday, June 21, 2021

CPMCA Contacts:

For educational classes, contact Michelle Lynn at michelle@cpmca.org or 818-275-2893.

For meetings, retreats, and all other events, contact Dana Giambalvo at dana@cpmca.org or 818-275-2890.



David Ashcraft's expertise is taking normally tortuous subject matter and making it educational, engaging, and entertaining. He learned early in his career that a bad presentation matched with a bad PowerPoint can persecute an audience and kill a presenter's message. Mr. Ashcraft has been engaging businesses as a professional speaker for over twenty years. Over the last ten years, David has been working with contracting associations and companies to teach their people the impact they have on financial outcomes. Mr. Ashcraft specializes in presentation coaching and financial education. He works closely with clients to design and develop training specific to their everyday business needs. Mr. Ashcraft received his BA from Washington State University and is a graduate of Pacific Coast Banking School, where he later served as an associate director. His clients include: Microsoft, Chase Bank, CBRE, Cushman and Wakefield, McKinstry, Turner, Wells Fargo, Plum Creek, Pacific Project Management, PitchBook, MCA of Western Washington, MCA Chicago, MCA Kansas City, New England MCA, Building Trades Employers Association, Puget Sound Bank, Cal Portland, Swift Marketing Group, Vistage, TEC Canada, Integrated Projects Group, Modern Construction Services, and Tiger Oak Publications.



Carol Cambridge is CEO of The Stay Safe Project, an international conference speaker and workplace violence expert. Highly profiled for her expertise, she is often sought by the media for comments when tragedies occur. Carol has been interviewed by: ABC, NBC, USA Today, CBC and as far away as News Channel Asia in Singapore. As a thought leader, she wants people to move away from Fear Based Thinking, which is limiting, paralyzing and just plain negative! Instead Carol shows people how to navigate fear and use their critical thinking skills to guide them through an emergency or a crisis.

Her career began as a communications specialist in emergency services and disaster preparedness with a Canadian Law Enforcement Agency. Today, 27 years later, Carol has taught over a quarter of a million people how to make smart, powerful and life-saving decisions. Known for her customization, compelling storytelling and experiential training, Carol masterfully facilitates and delivers information in a way that people find intriguing!



Harry Bederian became interested in the mechanical contracting industry when he was an undergraduate student at Cal Poly Pomona and served as the president of the MCAA/CPMCA Student Chapter. He majored in Engineering Technology with an emphasis in Mechanical and Manufacturing Engineering and a minor in Business. Harry began his career in the HVAC sector then 2 years later, transitioned to the industrial sector. He has been a Project Engineer at ARB, Inc. for the past 6 years and worked in a leadership role on projects that include, but are not limited to: the NRG Re-Power Project, the Mojave Solar Project, CRC Gas Compressor Station, and the Valero Refinery

Power Plant. His involvement in the industry is diverse, having also served as the CPMCA Education and Scholarship Committee Chair for the past 8 years, a mentor to the Cal Poly Pomona MCAA/CPMCA Student Chapter for the past 9 years and on the Engineering Senior Project Panel at his alma mater, Cal Poly Pomona. 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 through UCLA in June 2018.



As a speaker and presenter, **Eric Herdman** has trained employees in a broad range of corporate environments for more than 20 years. From multi-billion dollar pharmaceutical companies to top financial institutions and the world's largest franchise fitness center, he uses his accomplishments in sales, retail, health and fitness to help companies achieve top-level success.

Focusing on results, Eric has successfully facilitated a variety of courses related to strategic business practices, leadership and management, productivity and motivation. Eric has developed a proven system that helps students prioritize their work, effectively schedule their days, delegate to employees, manage information flow and teach negotiation skills. As a record-setting ultra-runner, he also shares his passion for perseverance and endurance with his students.



John R. Koontz has over 30 years of wide-ranging mechanical industry experience that includes contracting, academics, and consulting. He is a former Tenured Associate Professor in Purdue University's Department of Building Construction Management. He is also the founder and former director of Purdue's Mechanical Construction Management Specialization Program. In addition to his academic career, he spent 15 years in the employment of MCAA contractors in a variety of positions including senior project manager, project manager, project engineer, and estimator and is the founder of the first-ever MCAA student chapter which was started at Purdue in 1993. Professor

Koontz's family heritage of long-term UA family members (grandfather, great uncle, and father) provides a sincere and deep-rooted pride, interest, and concern for the future success and survival of all parties involved in union mechanical construction.



Mark Matteson started his career as an HVAC technician in 1976. He is one of those rare professionals who can say he is publisher, speaker, consultant and author and mean it. He has attracted clients in HVAC contracting, distribution and manufacturing as well as such organizations like Microsoft, T-Mobile, John Deere, Conoco-Phillips, Aflac, New York Mutual Life and other Fortune 500 companies on three continents. His annual speaking commitment typically means 40 Keynotes, 20 Seminars and Workshops and 5-10 Consulting engagements around the world.

A committed writer, Mark has written five books: including the international best seller, *Freedom from Fear* (OVER 100,000 COPIES SOLD!) that has been translated into Japanese and French. Mark is also the author of ten popular e-books including: *Presenting Like a Pro*, *Sales Success Strategies*, *Customer Service Excellence*. His monthly e- newsletter goes out to 6,900 people a month since 2003. He posts Tweets and comments on LinkedIn daily.

He is interviewed frequently and has been quoted in the media and has written articles for dozens of magazines. He is considered a thought leader, an idea reporter and agent of change who teaches his clients HOW TO GET MORE OF THE RIGHT THINGS DONE IN LESS TIME. He has done work internationally in Australia, Canada, Aruba, Mexico and Turkey. Furthermore, he has worked in 48 states in the U.S. He resides in Edmonds, WA with his wife of 40 years, Debbie. They have three grown sons. Mark takes great pride in the fact he has flunked high school English.



Stephane A. McShane is a Director at Maxim Consulting Group responsible for the evaluation and implementation processes with her clients. Stephane works with construction-related firms of all sizes to evaluate business practices and assist with management challenges. With a large depth of experience working in the construction industry, Stephane is keenly aware of the business and, most specifically, operational challenges that firms face. Her areas of expertise include: Leadership development, executive coaching, organizational assessments, strategic planning, project execution, business development, productivity improvement, and training programs.

Mrs. McShane is an internationally recognized speaker, mentor, author, and teacher. Her ability to motivate, inspire, and create confidence among your work groups is extremely rare and very effective. Stephane possesses the rare combination of talent from being in the field as an apprentice, electrician, foreman, then working her way through each operational chair within a successful electrical construction firm. Her ability and drive defined her to be “best in class” at each position held. This talent is what makes her tremendously effective at operational and organizational assessments today. She has successfully conquered every operational position from being an estimating trainee through executive management. She has built, trained, and led her teams to become the undisputed leaders in their markets. She is able to quickly identify organizational positives and negatives and assess appropriate action steps and throughputs.



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.



Theresa Crawford Tate is a partner in the firm of Crawford & Bangs. Her legal practice for the last 23 years has focused on construction contracts, claims and litigation. Crawford & Bangs is a small firm that specializes in all aspects of construction law. Ms. Tate graduated with honors from both the California State University at Fullerton and Loyola Law School. Ms. Tate is admitted to practice before all the state courts of California and the U.S. District Court for the Central District. Ms. Tate has been actively involved with many trade associations, including the Orange County Chapter of the Construction Financial Management Association (CFMA), Real Property Section of the Los Angeles County Bar (LACBA), Building Industry Association (BIA), and Orange Empire Sheet Metal & Air Conditioning Contractor's National Association (SMACNA). Ms. Tate is a frequent author and speaker on construction related topics, and her articles, as well as those authored by other members of her firm, are posted on the Crawford & Bangs website at www.BuildersLaw.com.

COMPUTER SKILLS/TECHNOLOGY

Microsoft Excel 2019 – Part 1 (of 3)

New Horizons Computer Learning Center – Anaheim

Wednesday, February 10, 2021

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 (of 3)

New Horizons Computer Learning Center – Anaheim

Thursday, February 18, 2021

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 (of 3)

New Horizons Computer Learning Center – Anaheim

Wednesday, March 10, 2021

8:00 a.m. – 4:00 p.m.

Member: Free

Non-Member: \$299



This course builds upon the foundational and intermediate knowledge presented in the Microsoft® Office Excel® 2019: Part 1 and Microsoft® Office Excel® 2019: Part 2 courses to help you get the most of your Excel experience. The ability to collaborate with colleagues, automate complex or repetitive tasks, and use conditional logic to construct and apply elaborate formulas and functions will put the full power of Excel right at your fingertips. The more you learn about how to get Excel to do the hard work for you, the more you'll be able to focus on getting the answers you need from the vast amounts of data your organization generates. This course is intended for students who are experienced Excel 2019 users and have a desire or need to advance their skills in working with some of the more advanced Excel features. Students will likely need to troubleshoot large, complex workbooks, automate repetitive tasks, engage in collaborative partnerships involving workbook data, construct complex Excel functions, and use those functions to perform rigorous analysis of extensive, complex datasets. To ensure success, students should have practical, real-world experience creating and analyzing datasets using Excel 2019. Specific tasks students should be able to perform include: creating formulas and using Excel functions; creating, sorting, and filtering datasets and tables; presenting data by using basic charts; creating and working with PivotTables, slicers, and PivotCharts; and customizing the Excel environment.

Bluebeam – BEGINNER

Christopher Suggs

Wednesday, April 14, 2021

7:30 a.m. – 2:30 p.m.

Member: Free

Non-Member: \$299



This session will focus on getting you acquainted with the interface and out-of-the-box every-day tools. Agenda will include:

REVV 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

NEW

Christopher Suggs

Wednesday, April 28, 2021

7:30 a.m. – 2:30 p.m.

Member: Free

Non-Member: \$299

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

NEW

Christopher Suggs

Wednesday, May 12, 2021

7:30 a.m. – 2:30 p.m.

Member: Free

Non-Member: \$299

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

AEC
Technologies

Resilience in the Workplace: Balancing Work Priorities and Life Responsibilities

Eric Herdman

Wednesday, March 31, 2021

7:30 a.m. – 2:30 p.m.

Member: Free

Non-Member: \$179



Being resilient means understanding that life is full of challenges. While we can't avoid stressful situations, we can have an open mind and be willing to adapt to change. Resilience in the Workplace is designed to help you discover your emotional intelligence, learn relationship-building strategies and build confidence in yourself – so you can cope better when your situation changes. This course will include the following subjects: Understanding Emotions, Learning to Thrive not Just Survive, Creating a Powerful Personal Brand, Preparing to Handle Competing Priorities, Needs Based Time Management, and Establishing Successful Partnerships.

Introduction to California Construction Contracts

Theresa Tate

Wednesday, April 21, 2021

7:30 a.m. – 11:30 a.m.

Members: Free

Non-Members: \$179

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

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

Project Managers Impact on Financial Outcomes

David Ashcraft

Wednesday, February 24, 2021

7:30 a.m. – 2:30 a.m.

Members: Free

Non-Members: \$179

Project managers will have FUN as they work through a case study and uncover the math mystery buried in the WIP. They will calculate each column by hand to see where the numbers come from and recognize which numbers provide key information. The key information will spotlight problems and opportunities contained within the numbers of a financial report. Project managers will increase their financial fluency and be able to communicate more effectively to get the right information to make their projects more profitable. Not to be missed!

Project Management 1 & 2

John Koontz

Fri. & Sat., February 26-27, 2021

Friday: 7:30 a.m. – 4:00 p.m.

Saturday: 7:00 a.m. – 11:30 a.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

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

Project Management 3 & 4

John Koontz

Fri. & Sat., March 26-27, 2021

Friday: 7:30 a.m. – 4:00 p.m.

Saturday: 7:00 a.m. – 11:30 a.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

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

Project Management 5 & 6

John Koontz

Fri. & Sat., April 16-17, 2021

Friday: 7:30 a.m. – 4:00 p.m.

Saturday: 7:00 a.m. – 11:30 a.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

- **Contracts:** Using the Contract as a Tool for Project Management: Gain a basic understanding of contract types and components, and learn how to use the contract to maximize profitability while managing a mechanical construction project. Learn skills to help you know what the contract says and how to organize and manage the project accordingly.

- **Effective Project Documentation:** Documentation is a very time consuming but necessary evil in the construction process. Due to the great risk accepted when a Mechanical Contractor signs a contract, all mechanical projects must have a contemporaneously written factual record/history of all significant events, written by the people closest to the work. The key with documentation is having the right amount and the right types of documentation based upon the specific characteristics of the customer and the project. Over documenting a project wastes valuable company resources and can distract the project team from solving difficult project problems. Under documenting a project gives the project team a false sense of security and puts the company in an unnecessary position of risk if something goes terribly wrong on the project. Great project managers and foremen understand that excellent project documentation can prevent or protect your company from problem “escalation.” In this session, the instructor will review all the basic project documentation types and discuss the steps necessary to plan and implement the project documentation process.

Driving Project Success

Stephane McShane

Thursday, April 8, 2021

7:30 a.m. – 11:30 a.m.

Member: Free

Non-Member: \$179

This class is a highly interactive session geared toward field leadership. Participants are immediately placed in the positions they find themselves every day – tasked to build a project without all the tools or information they need to get the project done. During the workshop, attendees learn about the importance of productivity, motivation, coaching, leadership, planning and technology to drive project performance. A full-scale BIM model of the project is utilized to demonstrate just how drastically technology and prefabrication are going to change the industry. This module sets the stage for the remaining content of the program by introducing all the concepts taught in the program. Attendees to include field leaders, project administrators, project engineers, project managers, project executives, group/branch executives, financial managers and owners.



Project Engineering Basics in Construction

Harry Bederian

Friday, May 21, 2021

7:30 a.m. – 2:00 p.m.

Member: Free

Non-Member: \$179

This seminar provides a practical overview of project engineering in construction. It is designed for individuals who have recently become a Project Engineer, are on the path to becoming a Project Engineer, have just transferred to this position, or are simply interested in what this role entails. A project engineer's task is to bridge the gap between engineering and management/construction. This course will cover the basics of how to fill and navigate this gap. Topics covered include: 1) The role/duty of a project engineer, 2) Request for Information, 3) Submittals, 4) Quality/Specifications, 5) Meetings/Meeting Minutes, 6) Scheduling, 7) Types of training/certificates, and 8) Do and Don'ts.



FOREMAN TRAINING

Foreman Training 3 & 4

John Koontz

Fri. & Sat., February 12-13, 2021

Friday: 7:30 a.m. – 4:00 p.m.

Saturday: 7:00 a.m. – 11:30 a.m.

Member: \$100

Non-Member: \$179

This two-day course will cover the following topics:

- **Effective Project Documentation:** Documentation is a very time consuming but necessary evil in the construction process. Due to the great risk accepted when a Mechanical Contractor signs a contract, all mechanical projects must have a contemporaneously written factual record/history of all significant events, written by the people closest to the work. The key with documentation is having the right amount and the right types of documentation based upon the specific characteristics of the customer and the project. Over documenting a project wastes valuable company resources and can distract the project team from solving difficult project problems. Under documenting a project gives the project team a false sense of security and puts the company in an unnecessary position of risk if something goes terribly wrong on the project. Great project managers and foremen understand that excellent project documentation can prevent or protect your company from problem “escalation.” In this session, the instructor will review all the basic project documentation types and discuss the steps necessary to plan and implement the project documentation process. The instructor will provide attendees with proven methods for successfully documenting all types of mechanical projects.
- **Time Management Skills:** The role of a project foreman is a dynamic and challenging thing to do for a living. It creates numerous time management challenges for the project foreman and causes daily chaos that must be successfully managed in a way that maintains project productivity, project profitability, and customer relationships. Improving time management ability for a project foreman is a difficult proposition that takes great personal commitment and self-discipline. This session identifies the greatest time wasters and provides strategies for improving time management skills.
- **Change Order Management:** Best Practices for Success: Successfully managing change orders on a complex and constantly changing project is often the project team’s greatest challenge. If not well managed by a proactive and knowledgeable project manager and foreman who are acting as great partners, change orders can cause unnecessary additional risk, destroy base contract labor productivity, ruin customer and contractor relationships, choke cash flow, reduce or eliminate profitability, and create nearly irreversible negative jobsite moral. In this session, John Koontz will provide all attendees, regardless of age or experience level, with numerous strategies and proven best practices for successfully navigating this multi-faceted and complicated project management challenge.

Foreman Training 5 & 6

John Koontz

Fri. & Sat., March 12-13, 2021

Friday: 7:30 a.m. – 4:00 p.m.

Saturday: 7:00 a.m. – 11:30 a.m.

Member: \$100

Non-Member: \$179

- **Essential Management Skills:** Learn the most important management skills utilized and mastered by all great managers. The primary focus of this session is “People Management.” Gain an understanding of the essential traits, skills, and behaviors that allow effective management.
- **Successful Survival of Project Closeout:** The end of a project is usually a challenging and difficult time for the project manager and the foreman. Unfortunately there is no magic formula, wand, or pill for eliminating the difficulty of project closeout. There are, however, several tactics and strategies the project manager and foreman can implement to improve end-of-job performance and mitigate the difficulties of project closeout. In addition to a review of innovative methods used by MCAA contractors to help reduce the typical end of project “profit/productivity drain,” this session will include the following project closeout topics: Beginning the project with the end in mind, Creating the Exit Plan, Punch list, Warranties, As-built drawings, O & M manuals, Customer satisfaction, Closeout productivity improvement, Demobilization, Third party commissioning, Change order finalization, Final payment, Feedback meeting
- **Best Practices of the Industry’s Best Foremen:** Why are some foremen in our industry consistently more successful, project after project, than their peers? What separates the “great” ones from the “good” ones? While age, experience, attitude, and talent are important factors in a foreman’s success, the instructor has identified, and will share, the best practices and skills that can be learned by any foreman who has the attitude, aptitude, and desire to improve and succeed. John will include an overview and in-depth discussion of the many of the best practices used by the industry’s best foremen. It also provides a review of the traits and qualities that are the common denominators among excellent project foremen.

PEOPLE MANAGEMENT/SKILLS

Building Bridges Between Generations

Mark Matteson

Friday, April 30, 2021

7:30 a.m. – 2:30 p.m.

Members: Free

Non-Members: \$179



This session will cover the following: Defining Millennials, Gen X'ers, Boomers and Traditionals, discover the 10 ideas for managing millennials, learn how each generation is formed (values, experience, music), learn how to improve your existing relationships with Gen X'ers and Millenials, embrace tools for change, 3 things millennials hate (and love), how millennials think differently and why that's a good thing, how we are the same (what everyone from 8-88 years of age want), how to attract and retain good people.

How to Be a Team Player

Eric Herdman

Thursday, May 13, 2021

7:30 a.m. – 2:30 p.m.

Members: Free

Non-Members: \$179



To effectively produce and survive in a diverse work environment, team-player thinking is imperative. Employees must learn to assume personal responsibility for the team's success, understand the whys of cooperation, and take to heart the reasons behind corporate goals. By attending this information-packed course, attendees will gain that critically important big-picture mentality of how personal efforts contribute to organizational success, a blueprint for mega-productivity, and a brand-new sense of unity. The result? The team will spend more time working together to reach department goals while sidestepping the problems that get in everyone's way. This course will include the following topics: Make a Personal Contribution to Team Success, Resolve Differences and Work Together as a Team, Increase Team Productivity, Take a Leadership Role.

Crisis at Work: Workplace Violence & Active Shooter

Thursday, June 3, 2021

7:30 a.m. – 2:00 p.m.

Members: Free

Non-Members: \$125



As hate, violence and tension rises in our communities, so does workplace violence and active shooter situations. Most companies in North America still do not have an effective plan to reduce violence and increase reporting. This leaves companies and organizations vulnerable and at a higher risk for escalating violence. In this interactive workshop, you'll learn:

- #1 strategy for reducing workplace violence
- Identify dangerous blind spots that could mean your employees are in harm's way
- The behavior that may be predictive of violence
- Relevant and immediately actionable strategies to reduce your liability
- 7 tips to survive an active shooter situation

In an active shooter scenario, you have only seconds to make a decision! In the midst of panic and chaos anyone can play an integral role in mitigating the impacts of an active shooter situation. This workshop will answer your questions and concerns; calm your fears; train your brain to respond and gives you the information you need to make quick life-saving decisions. This is a must-attend program that will provide you with life-saving skills! The focus is on survival not fear.

CERTIFIED SAFETY – SAFETY RISK CONTROL

ClickSafety – Online Safety Courses

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

Member: Free (however CPMCA will bill for the cost of the class if the class is not completed)

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. Contact Michelle at michelle@cpmca.org to register.



OSHA Online 10-Hour Safety & Health *Anytime Online*

OSHA 10-Hour Construction is a part of an online OSHA outreach program that results in a valid DOL/ OSHA 10-Hour Card. This OSHA 10 online training course teaches recognition, avoidance, abatement and prevention of safety and health hazards in workplaces. This course also provides information regarding workers' rights, employer responsibilities and how to file a complaint. It was also designed to help individuals stay up-to-date with their OSHA safety requirements.

OSHA Online 30-Hour Construction *Anytime Online*

OSHA 30-Hour Construction is an OSHA-Authorized online course featuring the required steps for completing OSHA Outreach training and receiving an OSHA 30 Card. This online training covers everything from Electrical Hazard Safety to Fall Protection. ClickSafety's OSHA 30-Hour Construction course is a proven way to receive a valid OSHA 30-Hour Card and achieve the safety level required by your company for work in the construction industry.

OSHA Updates Confined Spaces in Construction Standard *Anytime Online*

OSHA's final rule for Confined Spaces in Construction went into effect August 3, 2015. Are you and your coworkers prepared for the changes? Pete Rice, CSP, CIH discusses OSHA's Final Rule for Confined Spaces in Construction, including how it differs from the Confined Spaces in General Industry standard. Pete shares the Top 5 Changes to the CS in Construction rule and why the new rule was enacted.

ClickSafety has 2 new 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 [ClickSafety.com](https://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.

WEBCASTS ARE AVAILABLE AT WWW.CPMCA.ORG!

NOTE: All Webcasts are Online Courses that can be accessed on CPMCA's website at any time. They are available to CPMCA members only. Your company login information is required to access these courses.

Active Listening

Mark Matteson

Online Course – Please contact our office to obtain or create login credentials.

Active Listening is vital in today's business environment. In this webcast, you will learn from Mark Matteson the 4 steps to Active Listening and how to apply them in everyday business communication with your customers. According to Mark Matteson, the 4 steps to active listening are: listen actively; listen with intention; pause 3–5 seconds before responding; question for clarification and paraphrase. Incorporating these 4 basic steps into your customer relations will improve your effectiveness and increase your sales with your customers

BIM 101

Dwayne Lindsey

Online Course – Please contact our office to obtain or create login credentials.

There is simply no easier way to learn about BIM (Building Information Modeling) than viewing this easy to understand webcast. You will learn exactly what BIM is and why it's good for your industry in a non-technical way.

Excel: Insert Excel Sheet into Word

Ginnie Floraday

Online Course – Please contact our office to obtain or create login credentials.

You can incorporate an Excel workbook into your Word document. You have the choice of linking to the actual Excel sheet or bringing in a static copy of the worksheet. If you link to the original file it is called embedding. If changes are made to the original selection they will appear in the copied text within Word. A static copy will not transfer any of the changes back to the spreadsheet.

Excel: Solver Procedure

Ginnie Floraday

Online Course – Please contact our office to obtain or create login credentials.

This webcast will show you how to use the Solver function in Excel to streamline formulas in spreadsheets. Solver allows you to calculate a formula backwards. Participants will learn how to change the value of a cell that is dependent on a formula. An example of the application of this function is budgets. After setting individual projections within each department, a department total is generated for each department. If you know that a certain department cannot exceed a certain amount, the Solver can modify the individual numbers that impact the total. All you have to do is identify what the total should be, and Solver will modify any of the related cells.

Excel: Summarizing Data with Subtotals in Excel

Ginnie Floraday

Online Course – Please contact our office to obtain or create login credentials.

When the data is in list form, Microsoft Excel can calculate and insert subtotals in a worksheet. When you specify the items you want to create subtotals for, the values to be summarized, and the functions to use on the values, Microsoft Excel outlines the worksheet so that you can show or hide as much detail as you need. If you have summarized data by using formulas that contain functions such as SUM, Microsoft can automatically outline the data.

Going Green – Valuable Opportunities for Mechanical Contractors

Jeff Grossberg

Online Course – Please contact our office to obtain or create login credentials.

Jeff Grossberg will inform member contractors about the growing demand of sustainable technology. Grossberg encourages contractors to become leaders, rather than followers, and offers guidance on how contractors can grow their business and garner market share by entering the green building marketplace.

Green Building: LEED Certification and Sustainable Design

Lincoln Pearce

Online Course – Please contact our office to obtain or create login credentials.

Once considered a passing fad, green building has driven its roots deep into the American landscape. City Halls in Chicago and Atlanta have green rooftops and green building initiatives are thriving in Los Angeles, Seattle, Denver, Dallas and other major cities nationwide. Even the United Nations headquarters in New York will be renovated with green principles in mind.

Green Building: LEED Certification “So You Want to be a Green Contractor”

Dan Bulley

Online Course – Please contact our office to obtain or create login credentials.

Learn what it takes to become a green contractor with Dan Bulley.

Mechanical Estimating Techniques

Keith Rahn

Online Course – Please contact our office to obtain or create login credentials.

If you can expertly estimate the cost of a construction project you have the edge in the bidding process. Keith Rahn will teach you how to analyze contract documents and estimate more accurately than your competition. Keith's techniques will give you the tools you need to win the bid and establish long-term trusted relationships with your customers.

Microsoft Office 2007 Excel

Ginnie Floraday

Online Course – Please contact our office to obtain or create login credentials.

This webcast will give an overview to the updated version of Excel including improvements to Pivot tables, Filters and advanced formatting.

Microsoft Office 2007 Overview

Ginnie Floraday

Online Course – Please contact our office to obtain or create login credentials.

This webcast will give an overview to the updated versions of Excel, Word, PowerPoint and Outlook. Some of the new features to be reviewed will be the Ribbon (the replacement for the toolbar), the Mini Toolbar, document Themes and Quick Styles in Word. Excel enhancements include improvements to Pivot tables, Filters and advanced formatting.

Microsoft Word Fill-In Forms – Build a Word document with Fields

Ginnie Floraday

Online Course – Please contact our office to obtain or create login credentials.

A form is a structured document with spaces reserved for entering information. You design the form, and others can fill it in on paper or in Microsoft Word.

PowerPoint: Introduction to PowerPoint 2007

Ginnie Floraday

Online Course – Please contact our office to obtain or create login credentials.

This webcast will provide an overview to the updated version of PowerPoint.

Retro-Commissioning

Chris Philbrick

Online Course – Please contact our office to obtain or create login credentials.

Retro-Commissioning is a commissioning process applied to existing buildings that have never been commissioned. It is a systematic, documented process that identifies low-cost operations and maintenance improvements in existing buildings and brings the building up to the design intentions of its current usage. Retro-commissioning assures that the mechanical systems are optimally integrated and perform together as efficiently as possible. Retro-commissioning's primary focus is on using O&M tune-up activities and diagnostic testing to optimize the building systems. This course will outline the process and phases of RCx: planning, investigation, implementations, measurement and verification. Chris Philbrick will cover a typical project that has moved through the retro-commissioning process and will include a summary of cost and savings for multiple projects.

Typical low cost measure will be discussed as well as how the retro-commissioning process relates to LEED EB credits.

Water Efficiency and How It Relates to Green Building

Jim Allen

Online Course – Please contact our office to obtain or create login credentials.

Seventy percent of the Earth's surface is water... and yet only 3 percent is fresh water, and 57 percent of that fresh water is frozen in polar ice caps and glaciers. Only 1 percent of the Earth's water is available for human consumption – and the green building movement is working to conserve that vital, limited supply. This online course will inform member contractors about the importance of water conservation, as well as ways to improve water efficiency in a building project. The online course covers how different industries use water and provides an overview of national conservation initiatives. Upcoming technologies and emerging trends to conserve water are also discussed.

Workplace Violence

Rick Maltz

Online Course – Please contact our office to obtain or create login credentials.

Workplace violence is a leading liability to employers, but can be prevented with proper on-the-job measures. This webcast helps employers understand the impact of workplace violence, explains what Red Flag indicators to look for, and review best practices for developing a Workplace Violence Prevention program.



CPMCA

California Plumbing & Mechanical
Contractors Association

**California Plumbing & Mechanical
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