# Spring 2019
# Education Catalog

## INSTITUTE

An Initiative of

MCA Mechanical Contractors Association
METROPOLITAN WASHINGTON

EDUCATING
OUR FUTURE.

# A Message from Our Executive Vice President

The Mechanical Contractors Association of Metropolitan Washington, in partnership with the Industry Fund Trust, is pleased to announce the launch of the Capital Contractors Institute (CCI). The mission of CCI is to provide a "Best in Class" education experience through premier courses and programs at all levels of our member's organizational needs. CCI will kick off its inaugural semester by delivering a number of engaging courses, instructed by the industry's most reputable and knowledgeable leaders. We welcome all members to join the mission of the Capital Contractors Institute and build upon the foundation of this industry's premier contractor group.

Core Curriculum:
Our class offerings are designed to educate all aspects of your organizational needs; focusing on the following core subjects:

- Customer Service
- Professional Development
- Management Techniques
- Business Law & Finance
- Leadership Skills
- Safety & Technology
- Operational Improvement

Thank you for your support of the Capital Contractors Institute. We hope to see you in the spring!

Sincerely,

Thomas L Bello
Executive Vice President
MCA of Metro Washington

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## FEATURED


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# Semester at a Glance

| | |
|---|---|
| February 7 | Sparking Maintenance Success Seminar |
| February 8 | Customer Service Excellence Seminar |
| February 12 | General Construction Law Seminar |
| February 28 | Fundamentals of Field Leadership Training Part I of IV |
| | |
| March 5 | Sales Leadership Training Part I of II |
| March 6 | Sales Leadership Training Part II of II |
| March 19 | Transition from Field Tech to Office Professional Workshop |
| March 26 | Fundamentals of Field Leadership Training Part II of IV |
| March 27 | Blue Beam Beginner Seminar |
| | |
| April 18 | Fundamentals of Field Leadership Training Part III of IV |
| April 23-24 | HR: Practical Skills for Contractors 2-Day Workshop |
| | |
| May 1 | Blue Beam Intermediate Seminar |
| May 9 | Fundamentals of Field Leadership Training Part IV of IV |

# Course Descriptions

## SERVICE

### Sparking Maintenance Sales Success Seminar

**Mark Matteson—**

**February 7, 2019, 8:00 AM – 3:00 PM**

- Maximizing Sales
- Establishing Trust With Customers
- Relationship Building With Owners and Facility Managers

### Customer Service Excellence Seminar

**Mark Matteson—**

**February 8, 2019, 8:00 AM – 3:00 PM**

- Managing Customer Relations
- Effective Communication
- Systems for Positive & Negative Reinforcement

**This two-part seminar teaches customer-facing employees how to expand their sales market and maximize current customer relationships through customer service and retention techniques.**

**Recommended Audience:**

Sales Managers & Representatives | Service Managers & Technicians
Marketing Managers & Representatives | Project Managers | Foremen

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### Sales Leadership Training Part I of II

**Woody Woodall—**

**March 5, 2019, 8:00 AM – 3:00 PM**

- Developing a Replicable Sales Plan
- Developing Sales Incentives That Motivate Your Sales Representatives

### Sales Leadership Training Part II of II

**Woody Woodall—**

**March 6, 2019, 8:00 AM – 3:00 PM**

- Sales Mentoring and Coaching
- Essential Skills of a Mentor
- Effectively Evaluating Your Current Sales Processes

**This two-part training teaches critical skills in developing a successful sales team and an effective sales process.**

**Recommended Audience:**

Sales Managers & Representatives | Service Managers & Technicians
Upper Management Roles | Project Managers | Foremen

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## General Construction Law Seminar

**James Fullerton—**

**February 12, 2019, 8:00 AM – 3:00 PM**

- Understanding the Legal Scope of the Construction Industry
- Handling Construction Contracts, Such As: Collections, Claims, Disputes
- Managing Litigation, Procurement, and Government Construction Contracts

**This seminar teaches Construction Law focused on general and government contracts, collections, claims, and litigation.**

### Recommended Audience:

Sales Managers| Service Managers | Upper Management Roles
Human Resources Managers | Administrative Roles | Project Managers | Foremen

# FIELD LEADERSHIP CERTIFICATE

## Fundamentals of Field Leadership Part I of IV

**John Koontz—**

**February 28, 2019, 8:00 AM – 3:00 PM**

- Planning & Productivity Improvement
- Communication to Maximize Profitability
- Material Management and Labor Productivity

## Fundamentals of Field Leadership Part II of IV

**John Koontz—**

**March 26, 2019, 8:00 AM – 3:00 PM**

- Project Documentation
- Managing Mechanical Project Labor Costs

## Fundamentals of Field Leadership Part III of IV

**John Koontz—**

**April 18, 2019, 8:00 AM – 3:00 PM**

- Essential Management Skills for Field Leaders
- Managing Jobsite Change Orders

## Fundamentals of Field Leadership Part IV of IV

**John Koontz—**

**May 9, 2019, 8:00 AM – 3:00 PM**

- Successful Project Closeout
- MCAA Contractor Methods to Reduce the Profit & Productivity Drain

**This four-part course utilizes a full-scale leadership approach to teach skills for project planning, management, execution, and closeout on the jobsite.**

### Recommended Audience:

Service Managers & Technicians | Construction Managers | Project Managers
Field Supervisors | Leadership Roles | General Foremen & Foremen

# CAREER DEVELOPMENT

## Transition from Field Tech to Office Professional Workshop

**Woody Woodall—**

**March 19, 2019, 8:00 AM – 3:00 PM**

- Expectations of All the Key Positions in a Service Office
- Leadership and Management—What Is the Difference?
- Internal and External Customer Service Relations

**This workshop prepares individuals with a technical background to enter the office setting through management and communication techniques.**

### Recommended Audience:

Service Managers & Technicians
Construction Managers | Project Managers
Field Supervisors | Leadership Roles
General Foremen & Foremen

## HR: Practical Skills for Contractors 2-Day Workshop

**Ivette Dupuis—**

**April 23 & 24, 2019, 8:00 AM – 3:00 PM**

- Fundamental Skills of a Creating a Successful HR Environment
- Measuring Employee Performance
- Recruitment & Retainment Strategies

**This two-part seminar teaches the fundamentals of HR tailored to the needs of large and small businesses.**

### Recommended Audience:

Human Resources Managers
Administrative Roles | Hiring Managers

# CONSTRUCTION TECHNOLOGY

## Blue Beam Beginner Seminar

**Ginnie Floraday—**

**March 27, 2019, 9:00 AM – 12:00 PM**

- Overview of Blue Beam
- Understanding Expansive Select Layout, Document Navigation, Markups, and Customization
- Measuring Techniques and Document Management

SOLD OUT

## Blue Beam Intermediate Seminar

**Ginnie Floraday—**

**May 1, 2019, 9:00 AM – 12:00 PM**

- Advanced Markup, Including Places and Spaces Tracking
- Introduction to Batch Link, Sets, Fill-In Forms, and Custom Columns
- Advanced Room Measurement Tools

**This two-part seminar will focus on the necessary skills to become proficient in the Blue Beam software.**

### Recommended Audience:

Service Managers & Technicians | Project Managers | Field Supervisors | Foremen

# Our Faculty

## Mark Matteson

Mark Matteson started his career as an HVAC technician in 1976. He has attracted clients in HVAC contracting, distribution and manufacturing as well as organizations like Microsoft, T-Mobile, John Deere, Conoco-Phillips, Aflac, and other Fortune 1,000 companies because of his speaking and consulting abilities. His annual speaking commitment typically means 40 Keynotes, 20 Seminars and Workshops and 5-10 Consulting engagements around the world.

## Woody Woodall

Starting as a Local 602 Steamfitter in the Washington D.C. region, Woody Woodall completed his apprenticeship and became an instructor for the Union Apprentice Program. Woodall is also the managing principal of Customer Focused Solutions, Inc., an organization he founded to assist contractors, associations and businesses achieve their strategic goals. After a long and distinguished career in the mechanical contracting industry, Woodall now focuses on education, collaboration, and operational support. His innovative approach to sales has transformed customer service teams from average to best in class.

## James Fullerton

James Fullerton, President of Fullerton & Knowles, P.C., practices attorney law in DC, MD, PA, and VA. Fullerton represents owners, lenders, design professionals, suppliers, subcontractors, general contractors and other members of the real estate and construction industries region-wide. He advises on construction law issues; public procurement and bidding, contract formation and disputes; defects in labor and materials; design defects in plans and specifications; inefficiency, impact and delay claims; mechanic's lien and bond rights; litigation, arbitration and mediation in public and private projects; commercial transactions and loan closings; sales contracts and leases.

## John Koontz

John Koontz has over 30 years of mechanical industry experience, including contracting, academics, and consulting. A former tenured associate professor at Purdue University, Koontz founded and directed Purdue's Mechanical Construction Management Specialization Program and MCAA's first student chapter. Additionally, Koontz has worked with MCAA contractors for 15 years in a variety of positions, including senior project manager, project manager, project engineer and estimator. Koontz's family heritage of long-term UA family members provides a sincere and deep-rooted pride, interest and concern for the future success and survival of all parties involved in union mechanical construction.

## Ivette Dupuis

Ivette Dupuis's career is forged at the intersection of Business and Human Resources. Over the last 20 years, she has perfected her craft and received a handful of certifications along the way. Dupuis began in HR for an HVAC contractor, later transitioning to finance and HR function for Fortune 250 and global companies. Dupuis has since returned to the mechanical and service contracting industry. Additionally, Dupuis has expanded her talent to educational atmospheres and is an adjunct professor and board member of the business school at her alma mater, Rollins College.

## Ginnie Floraday

Ginnie Floraday has consulted and taught technology courses for over two decades. Floraday's primary areas of expertise include corporate training and database development in Microsoft Access. She trains and consults remotely and onsite in various platforms, including the Microsoft Office Suite, Bluebeam Revu, and iOS (iPad, iPhone). Floraday encourages her clients to explore and use the tools in order to build a more comfortable relationship with the software.

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# Our Facility

## Tommy Douglas Conference Center

10000 New Hampshire Avenue, Silver Spring, Maryland 20903

- Over 25,000 square feet of meeting space to accommodate meetings of 5–600 people
- Dining room, business center, mezzanine lobby, ballrooms, and breakout rooms
- Function rooms available with abundant exposure to natural light
- State of the art technology and conference services, banquet, and AV staff on site
- Upscale culinary experience to include daily meals of breakfast, lunch, and dinner

# Capital Contractors Institute Information

## MCA of Metro Washington Staff

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**Media & Event Coordinator**
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## MCA of Metro Washington Office

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For any inquires about Capital Contactors Institute, please contact **CCIeducation@mcamw.org**.

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# REGISTER NOW at MCAMW.ORG

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