

What is the LiFT Level 2 Program?

The MCAKC LiFT Level 2 Project Management Program provides experienced project managers with the tools and skills to build on, apply, or enhance existing knowledge. This program provides valuable knowledge and skills that are difficult to obtain on the job.

Taught by experts in the mechanical contracting industry, you'll learn how to establish your project management team, change orders, claims avoidance, document control and scheduling, forecasting and project financials, managing and building third-party relationships, and PM sales skills.

As a project manager, you will no longer see yourself as just another employee or witness to project outcomes. You will become a project owner who has a personal stake in project outcomes with the tools necessary to succeed.

This program consists of ten, four-hour weekly seminars.

Program Benefits

- Connect with local Kansas City project management professionals in the mechanical contracting industry.
- Receive a robust participant guide with tools, job aids, resources, and templates to use back on the job.
- Gain tools and skills necessary to take an active role in your company's future and success.
- Become a better leader with an action plan to improve your project management success.

Who Should Attend?

Project Managers with 3-7 years of experience. Participants may already have established project management skills but desire improvement in a wider range of more specific, advanced management competencies and abilities.

When & Where?

The next (10) Week Program is weekly **each Wednesday January 24 – March 27, 2024.**

Location:

MCAKC Knowledge Center
10955 Lowell Avenue, Suite 1050
Overland Park, KS 66210

Questions?

Contact us at:
learn@mcakc.org
913.948.9200

Program Seminars

1. Job Costs, Labor Control, and Post-Job Review

In this seminar, we'll explore the most important aspects of project management that ensure your projects will run smoothly. As the tools and technologies for tracking these metrics evolve, the enduring challenge lies in understanding what to monitor, what to track, how to track it, and best practices for identifying, mitigating, and managing these crucial aspects.

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

In this workshop, participants will learn:

- The importance of the job cost report and proven methods for comprehensive monthly analysis.
- Break down daily work activities, differentiating between direct installation, indirect operations, material handling, and non-productive tasks.
- Explore the financial implications of gaining or losing just 30 minutes of direct installation time daily on the job site.
- Best practices for the measurement and management of field productivity.
- Identify the factors that improve labor productivity and develop strategies and tactics for their identification and implementation.
- The importance and benefit of post-job reviews and how to conduct effective post-job review meetings.
- Tips for optimizing the benefits of performing the post-job review.

Learn how to leverage post-job review information for future project estimates and rough order of magnitudes (ROMs).

Instructor

Troy Aichele has a B.S. in Construction Management, an A.A.S in HVAC and Refrigeration Design and has worked in nearly every facet of commercial construction as a Mechanical Contractor for nearly 30 years. Through Aichele & Associates, LLC, he teaches national workshops focusing on project management, managing, and forecasting labor, estimating, change orders, blueprint reading, and how to perform water audits. He's also a former MCAA Career Development Committee Chairman and was an adjunct professor at the University of Washington for 17 years.



2. Claims Avoidance

The construction industry inherently carries large levels of legal liability, and contractors need to understand their obligations to have a successful project. This session focuses on the primary issues that lead to claims on a construction project and the strategies that can be used to help avoid the claims process to be a more profitable company.

Instructor

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3. Taking Flight with DISC Communication Profiles

Learn to overcome communication barriers and enhance your professional skills in this seminar. Gain a deeper understanding of your behavior and others to boost effective communication. Discover strategies for improved leadership and people management through the Taking Flight with DISC program, which focuses on self-awareness, social awareness, flexibility, and cultural competence. By connecting personality styles to birds, this innovative approach makes it easy to remember and apply in your daily interactions:

- Eagles: Direct and dominant
- Parrots: Interactive and social
- Doves: Compassionate and supportive
- Owls: Logical and conscientious

Enhance your ability to understand, motivate, and support your team while fostering better relationships and creating a more engaging work environment.

Instructor

Lisa Austin is the founder and President of Austin Training Advisors. As a business owner she's responsible for the day-to-day tasks of launching and running a successful woman owned company. She has been developing and delivering custom employee development workshops since 1997 with a special emphasis on Customer Service, Effective Communication, and Employee Engagement. Prior to opening ATA, Lisa was a senior trainer for a large mutual fund company where she was instrumental at dealing with the challenges and frustrations faced in the fast-changing business world. She is a seasoned professional and her enthusiasm and energy make for a highly motivational experience.



4. Cash Flow & Cracking the WIP

Part 1: Managing the Lifeblood of Contracting - Cash Flow

Cash flow is one of the most important issues facing contractors today. As the market continues to stay strong, companies are faced with starting new projects, hiring staff, and investing in assets to support the business. More companies go bankrupt due to cash flow issues than due to profitability. Many things can and should be done to improve cash management practices.

We will explore a range of tools and techniques, from simple to complex, that allow firms to manage and control cash flow. Examples include contractual negotiation strategies, pricing and bidding practices, development of cost and resource-loaded schedules that tie to billing activities in the schedule of values, use of 12-week cash flow forecasts, project closeout procedures, and managing the billings and collection cycle. An interactive cash flow simulation provides hands-on experience that enhances the learning outcomes.

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

- Describe the importance of cash management practices.
- Increase profits with billings and collections.
- Apply tools and techniques that optimize cash flow.
- Maximize cash flow with process standardization.
- Create transparency and accountability with measurement.

Part 2: Cracking the 'WIP' – Driving Predictable Cost Projections

Many project managers lack a clear understanding of how their projects are performing financially. Most commonly, it's because they haven't been trained to forecast properly. We find many contractors struggle with how to build a robust cost projection process that provides consistency and predictability.

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

- Identify how to manage work-in-process for better profitability.
- Explain the relationship between project profitability and processes (budgeting, forecasting, change control, job status reporting and WIP).
- Apply earned value reporting to projects.

Instructor

Stephane McShane, a Director at Maxim Consulting Group, brings extensive construction industry experience to help firms of all sizes optimize their operations. With expertise in leadership development, coaching, assessments, planning, project execution, business development, productivity enhancement, and training, she is an internationally acclaimed speaker, mentor, author, and motivator. Stephane's journey from apprentice to executive management in electrical construction provides her with a unique perspective to conduct effective operational and organizational assessments. Her track record of turning teams into market leaders underscores her ability to swiftly identify strengths and weaknesses, recommending actionable solutions.



5. Negotiation Techniques

Mechanical project managers spend a substantial part of each day negotiating. They negotiate customer issues, change orders, subcontracts, equipment and material purchases, rental equipment rates, submittal and shop drawing approval, time and space allocation, back charges, etc. Most project managers have no formal training in negotiating, putting them at a great disadvantage. This seminar provides the basic skills to improve negotiating abilities and increase the project manager's comfort level when negotiating.

Discussion topics will include:

- The process and methodology of negotiating
- The importance of creativity in negotiating
- Understanding the importance of "win-win" negotiating and long-term relationships
- Negotiating consciously—following methodology rather than "winging it"
- Qualities, traits, and characteristics of great negotiators
- Myths and realities of negotiating
- The importance of controlling your emotions when negotiating
- Understanding the issue of leverage and using leverage to your advantage
- Dealing with the fear of rejection
- Getting over the resistance or fear of asking for what you need or want
- How to respond or deal with a "no" or "maybe" answer
- The importance of proper preparation
- Dealing with being blind-sided/surprised
- The importance of knowing and understanding the other person and their needs
- Why you must believe that everything is negotiable
- Learning to say NO
- Knowing when to walk away

Instructor

John R. Koontz, MCAA's Director for Project Management Education, has almost four decades of wide-ranging mechanical industry experience that includes contracting, academics, and consulting. He is a former Tenured Associate Professor in Purdue University's Department of Building Construction Management. He is also the founder and former director of Purdue's Mechanical Construction Management Specialization Program and is the founder of the first MCAA student chapter 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's family heritage of long-term UA family members (grandfather, great uncle, and father, and others) provides a sincere and deep-rooted pride, interest, and concern for the future success of all parties involved in union mechanical construction.

John has a Bachelor's Degree in Building Construction Management from Purdue University and a Master's Degree in Construction Management from Washington University in St. Louis. Since leaving Purdue in 1999 to join the MCAA full time, John has been travelling throughout America speaking, teaching, training, consulting, and writing about all subjects related to project management and the mechanical contracting industry.

6. **Start-Up, Commissioning, and Closeout**

This workshop, Successful Start-up, Commissioning, and Closeout, takes a comprehensive approach to project management by focusing on the end goal from the beginning. Proper installation and operation of equipment and systems are crucial for demonstrating compliance with contractual obligations and ensuring final payment. Moreover, successful closeout leaves a lasting impression on the General Contractor and Owner long after the project is completed.

This workshop is designed for Project Managers and Assistant Project Managers who want to gain a thorough understanding of the Start-up, Commissioning, and Closeout process, as well as learn the best management and documentation practices to implement during this process.

In this seminar, you'll learn about the typical documentation requirements and forms involved in the process, including Quality Control, Preliminary Inspections, Pre-Startup Checklists and Forms, Pre-Functional Checklists, Startup, and Test Reports, As-Built, Valve Tag Lists, Punch Lists, Operation & Maintenance Manuals, Owner Training, and Warranties. Additionally, we'll explore the objectives and benefits of Commissioning a new building and the keys to a successful Commissioning Process and Closeout. You'll also gain insight into key Commissioning activities during Pre-Design Phase, Design Phase, Construction Phase, and Occupancy/Operation Phases, providing you with a comprehensive understanding of the entire process.

Troy will also share valuable lessons he's learned, equipping you with the knowledge and expertise necessary to manage and document the process effectively. Don't miss out on this opportunity to enhance your project management skills and ensure your projects are a resounding success.

Instructor

Troy Aichele has a B.S. in Construction Management, an A.A.S in HVAC and Refrigeration Design and has worked in nearly every facet of commercial construction as a Mechanical Contractor for nearly 30 years. Through Aichele & Associates, LLC, he teaches national workshops focusing on project management, managing, and forecasting labor, estimating, change orders, blueprint reading, and how to perform water audits. He's also a former MCAA Career Development Committee Chairman and was an adjunct professor at the University of Washington for 17 years.



7. Situational Leadership

Upon completion of this seminar, participants will be able to:

- Identify the leadership styles you are most comfortable using, and then develop additional styles to use in specific situations.
- Diagnose the development level for each of your employees.
- Match the appropriate leadership style to your employees' development level to provide the appropriate support he or she needs.
- Communicate performance direction clearly while building an employee's self-esteem.
- Appropriately use praise and recognition to help improve employee's performance.
- Delegate effectively with peak performers and coach and support those staff who are experiencing performance problems.

Instructor

Gary Polain is the Principle of OZmosis Leadership. A native born Western Australian, he began his professional career as a Mechanical Engineer specializing in power station design, dust pollution control, and mine ventilation systems. Gary has over the last twenty years committed himself to a most accomplished career in 'Human Engineering'.



8. Killer Contract Clauses

Understanding the complex terms and conditions included in most construction contracts, and negotiating reasonable modifications to those terms and conditions, are central elements to the successful management of risks imposed on your company. This class will explore the most common clauses by which project owners and general contractors shift risk down to subcontractors, focusing on risks they create, recommended changes to make them more reasonable, and strategies to try to negotiate these changes.

Specific topics include:

- Risk shifting clauses (e.g., no-damages-for-delay, pay-if-paid, differing site conditions)
- Process and procedure clauses (e.g., notice, submittals, payments, changes, disputes)
- Design responsibility clauses
- Clauses incorporated by reference
- Contract exhibits
- Bond forms · Creating reasonable modifications
- Strategies to negotiate modifications

Instructor

Chip Mitchell is the founder and principal of Blue Fence Advisors, with over three decades of experience in the construction industry, both in business and law. He has served as General Counsel & Chief Administrative Officer for a leading mechanical contractor, managing legal, risk management, and HR departments, along with corporate governance, compliance, contract management, and dispute resolution. He is also a private arbitrator and mediator, affiliated with the American Arbitration Association. Chip's expertise extends to M&A transactions, and he has taught contract management at the MCAA Institute for Project Management. He holds a Juris Doctor from Georgetown University Law Center and is a member of several legal organizations, including the American Bar Association.



9. Setting Up Your Project for Success - The Project Plan

Upon completion of this seminar, participants will be able to:

- Explain how pre-planning components are critical to project performance and success.
- Build a productivity plan from the project estimate.
- Establish project performance goals and milestone measurement criteria.
- Describe strategies to enhance project profitability during the pre-construction phase.

Instructor

Chris Champagne has been employed with the P1 Group Inc. for the last 20 years. During his tenure, he has advanced from estimator to project manager to his current position of operations manager where he oversees project management staff, manages the sheet metal fabrication process and evaluates mechanical and plumbing estimates before submission. Champagne is a licensed professional engineer in the state of Kansas and holds a LEED certification. He is active in the Kansas City chapter of the Sheet Metal and Air Conditioning Contractors National Association and the Design-Build Institute of America.



10. Change Orders

Upon completion of this seminar, participants will be able to:

- Explain how change orders impact projects.
- Price and negotiate change orders to a profitable outcome.
- Outline how to get approvals for change orders.
- Compare the differences in impact a strategy between additive and deductive change orders.
- Explain the importance of tracking and documenting change orders.

Instructor

Chris Champagne has been employed with the P1 Group Inc. for the last 20 years. During his tenure, he has advanced from estimator to project manager to his current position of operations manager where he oversees project management staff, manages the sheet metal fabrication process and evaluates mechanical and plumbing estimates before submission. Champagne is a licensed professional engineer in the state of Kansas and holds a LEED certification. He is active in the Kansas City chapter of the Sheet Metal and Air Conditioning Contractors National Association and the Design-Build Institute of America.

