

2017 Sheet Metal & HVAC Project Management Certificate Program

BAY AREA CHAPTER



Designed specifically for the Bay Area SMACNA Contractor



- Being a Project Manager is not just a job; but a career path that can lead to many opportunities in the construction industry.
- Learn how to successfully orchestrate the people, resources, and tasks it takes to execute projects on time and within budget while developing better relationships with your internal and external customers.
- Develop skills that will benefit both you and your company.



Bay Area SMACNA Training Room
7677 Oakport Street, Suite 805
Oakland, CA 94621



Tuesdays, Wednesdays & Thursdays
September 12 - October 19, 2017
4:00 p.m. - 8:00 p.m.

Registration is limited to the first 25 students who
submit their registration form and tuition

This program is designed for students with a minimum
of one year Project Management experience



510-635-8212

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Project Management Introduction and Overview - September 12th & 13th - Kevin Dougherty

This introduction will dive right into the program and immediately give attendees tangible skills to put to immediate use. This module will cover the basics of project management and give attendees an overview of the overall certificate program. All attendees will take a pre assessment to use as a benchmark for improvement during the SMACNA Project Management Certificate Program. Kickoff topics will include: Introduction to the basics of project management, decision making and planning tools, the pre-planning meeting, how to run a proper kick-off meeting, job-site organization, production meetings, scheduling basics, problem solving tools and techniques, project review and evaluating team performance. These sessions will encompass the full range of a typical construction project and will include best practice policies and procedures used successfully by companies to complete projects on time and on budget.

Better Time Management: Leveraging Skills, Tools and Choices - September 14th - Kathy de Jong

In today's ever-changing workplace, most of us are increasingly being asked to get more done in less time. Indeed, time has been described as "the scarcest resource" for organizations and leaders. This program will help project managers identify their key timewasters, generate useful tips, and strategize how to leverage personal skills to enhance their productivity. Focus will be on the foundations of effective time management to align the resource of time to selected individual and organizational priorities. Participants will create action plans to create better time-saving practices and habits for greater organizational impact.

Pre-Construction Cost Management - September 19th - Stephane McShane

This course will examine the value and positive impact of a well-planned project and explore the different types of plans that could be developed. Planning does not end when the project starts. Stephane will discuss how to lead planning from the beginning of the project all the way until the customer accepts the finished project.

Job Cost Management - September 20th - Stephane McShane

Project managers need to understand basic financial information and should be able to connect the financial performance of their project to the performance of the business overall. In this session, Stephanie will explain the basics of Earned Value Management, job cost accounting and explain key concepts such as cash flow and profit. The project manager will gain deeper appreciation for the importance of actions that impact profitability, reporting and cash flow.

Contract Administration: Crossing the T's and Dotting the I's - September 21st - Stephane McShane

This is not the glory topic, but it may be the most important aspect of a project manager's role when it comes to mitigating risk and protecting the company. Stephane will review the pitfalls and lessons that every project manager must be watching on their contract and tell a few stories to illustrate the importance of thorough contract documentation and administration.

Putting Your Best Foot Forward: Speaking So Others will Listen - September 26, 27 & 28 - OR - September 26, October 3 & 4 - Kathy de Jong

Two key aspects of any construction project is convincing the customer to buy from your company and subsequently engaging their trust at all stages of a project. As leaders in the sheet metal industry, you need to present yourself and your organization to the best advantage in meetings and in one on one conversations. Learn how to build upon your existing strengths and create presentations that effectively capture the interest of the other party and highlight the benefits of your ideas. Note: All students come to class on the 26th and half the class will return the 27th & 28th and the other half the 3rd & 4th.

Delay Damages and California Construction Law - October 5th

Elizabeth Pappy and Donnelly Gillen – Burke, Williams & Sorenson, LLP

This course is an overview of the law as it relates to construction projects with an emphasis on California Law. Students will be prepared to recognize and avoid situations and contract clauses which can lead to lawsuits, and how to protect themselves and their company when disputes arise. They will learn how to understand and anticipate the ramifications of contract documents and how to renegotiate unfair or poorly written clauses, as well as the steps that must be taken to perfect your mechanic's lien, stop payment notice and payment bond rights. Delay damages will include the legal aspects of scheduling, risk management allocation, types of construction delays and delay damages, delay claims and analyzing delays, calculating damages, recovery, termination and pursuing the surety.

Construction Insurance, Bonding and Risk Management - October 10th

Tyler Kannon - Gallagher Construction Services

Gallagher Construction Services will answer your questions about insurance, bonding and risk management for all of your construction projects. Upon completion of this course, students should be able to assess and evaluate needs for bonding and insurance to mitigate risk.

Conflict Management – How to Communicate with Credibility, Tact and Diplomacy

October 11th - Michael Geraghty

A project manager must be able to resolve conflicts on the job with customers, contractors and employees in a constructive manner that results in a positive outcome. This course will focus on identifying sources of conflict and strategies for resolving conflict at all levels of a project. Students will improve their project performance by becoming more skillful in managing conflict; increase their listening skills, problem solving ability and confidence in resolving or preventing conflicts on their projects. Students will learn to be better prepared to handle a conflict situation at work or home, and lead it in a constructive direction.

Power Secrets of Master Negotiators - October 12th - Michael Geraghty

In this course, students will learn effective negotiation skills for project managers that will give them "the ability to sell themselves and their ideas." Whether they are negotiating for resources, money or staffing, their ability to persuade or influence others is critical. Students will learn how to maximize their effectiveness by using the PITI model of negotiation. Upon completion students will gain a great understanding of the psychology of negotiation and develop powerful skills to ensure their success.

Sheet Metal Estimating - October 17th - Kevin Dougherty

This course will help students to think differently about the estimating process, and how to approach each opportunity realistically. Project managers will learn not to look at the estimate as a number, but more as a process from job inception to job completion. Topics to be covered include customer types, what foreman and superintendents say about the best estimators, contracts, various project options, how to protect your company's interest, internal communication, job kick-off meetings, scheduling and general conditions, traps, snares and opportunities.

Change Order Management - October 18th - Stephane McShane

Effective change order management can dramatically reduce a subcontractors risk and increase profitability. This interactive course explores the change order process from a subcontractors view point and provides participants with hands on training in recognizing, scoping, pricing, and negotiating change orders. This course culminates in a mock negotiation where participants can immediately practice the skills that they have learned.

Panel Discussion and Certificate Awards - October 19th

Member owners, executives and instructors will participate in a 60-90 minute facilitated panel discussion. Students will be given the opportunity to ask questions (either anonymously or during the session) of the owners and instructors relating to a typical construction project and/or work experience. Certificates of Completion will be awarded after the panel discussion.

Meet the Instructors

Kathy de Jong is excited to have joined the Bay Area SMACNA team as Labor Relations Manager this year. Previously she worked for PG&E as the Senior Program Manager in the Leadership and Employee Development Department overseeing the onboarding of all new leaders for the organization. During her 20 years of experience as a business owner, consultant, and manager, she has partnered with numerous internal and external customers to foster leaders' impact on the targeted formation, development, and execution of their teams. She has developed and delivered programs for SMACNA chapters across the United States and Canada since 2001 and has spoken at several SMACNA National Conventions. Her customized leadership programs and targeted consulting have delivered results to numerous other customers and industries including: Comcast, Genentech, Kaiser Permanente, The City of Oakland, Webcor Builders, and Wells Fargo.



Kevin Dougherty has been speaking to the construction industry for the last 20 years. 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 sales manager and corporate trainer for a multimillion-dollar mechanical contractor. Kevin has also been a frequent speaker for various associations, World of Concrete, PHCC, SMACNA, MCAA, MSCA and QSC Chapters. Kevin's ability to entertain audiences and hold their interest while getting his message across consistently makes him one of the industry's top speaking talents.

Michael Geraghty is an expert on cross cultural communication and negotiation. Michael has 14 years corporate experience in a Fortune 500 Company as Head of International Purchasing. Mr. Geraghty has negotiated deals and contracts all over America, Europe and Asia. He is an Adjunct Professor at St Mary's College, Moraga, California, and a National Instructor for Institute of Supply Management and State Instructor for California CPA Society. Mr. Geraghty holds a Master's Degree from UC Berkeley.



Stephane McShane is a Senior Consultant at Maxim Consulting Group and works with construction related firms of all sizes to evaluate business practices and assist with management challenges. Her areas of expertise include: Leadership development, organizational assessments, strategic planning, project execution, business development, productivity improvement, and training programs. 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. Stephane is an extremely motivational and inspirational speaker, mentor, and teacher. Her ability to create confidence and desire among work groups is extremely effective.

Registration Form

2017 Sheet Metal & HVAC Project Management Certificate Program
\$1,500 Registration Fee Per Student

Submit registration form via e-mail to npirrone@bayareasmacna.org or fax to 510-635-0320

Registration is limited to the first 25 students who submit their registration form and tuition

This program is designed for students with a minimum of one year Project Management experience

Member Firms will receive 100% reimbursement upon successful completion of the program

Student First Name

Last Name

Middle Initial

Company Name

Job Title

E-Mail Address

Cell Phone