



# S.D. Mator



April 2015

Volume 13, Issue 9

## SITE TOUR: UCSD's ALTMAN CLINICAL & TRANSLATIONAL RESEARCH INSTITUTE

**DATE:** TUESDAY, APRIL 21, 2015

**TIME:** 5:00 PM—Site Tour Registration  
Meet at Rudolph & Sletten's Jobsite Entrance

5:30 PM—Site Tour

6:30 PM—Dinner Registration

For those not attending the Site Tour

7:15 PM—Dinner Service Begins

During Dessert—Pledge of Allegiance, Self-  
& Coffee Introductions, Announcements

### PROGRAM:

**SITE TOUR & DINNER PRESENTATION  
FOR UCSD'S ALTMAN CLINICAL AND  
TRANSLATIONAL RESEARCH INSTITUTE**

### SITE TOUR LOCATION:

**Altman CTRI Jobsite**

9444 Medical Center Drive, La Jolla

Attendees **MUST** park in Parking Lot P702  
adjacent to the jobsite.

### SITE TOUR HOSTS/PRESENTERS:

Rudolph & Sletten General & Engineering Contractors

**Rick Guinn**—Project Principal

**Kristy Jarvis**—Project Manager

### DINNER MEETING VENUE:

**Sheraton La Jolla Hotel** (2<sup>nd</sup> floor meeting room)

3299 Holiday Court, La Jolla

**COST:** \$40 per person

\$25 for full-time students

\$10 for site tour only

*Cancellations must be received by NOON on Monday,  
April 20<sup>th</sup> or no shows will be billed accordingly.*

[Click here for Dinner Mtg Reservation Policy](#)

**RSVP:** Meredith Stumpo, E  
Turner Construction Co.

858.217.0756 or [mstumpo@tcco.com](mailto:mstumpo@tcco.com)

## April Program Notes: Site Tour & Dinner Meeting Presentation for UCSD's Altman Clinical and Translational Research Institute

San Diego Chapter #4 has previously had the opportunity to visit two significant projects associated with the UCSD Health System's La Jolla campus: the Sulpizio Cardiovascular Center and the massive Jacobs Medical Center complex. Our members and invited guests will visit the Altman Clinical and Translational Research Institute this month through the efforts of Rudolph & Sletten's project team. We will again feature one of the healthcare facilities that make San Diego County unique in delivering cutting-edge medical technology and incomparable services to its citizens. The

[\(cont'd on pg.3\)](#)

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**F**or our March meeting, we had what proved to be another outstanding presentation given by Dr. Wendy Patrick, San Diego County Deputy District Attorney and Faculty Member at SDSU College of Business Administration. Her program entitled "Ethical Decision Making in Business" went through various topics, including Greed is Good: The Dark Side of Ambition; Words Matter; Contemporary Objectivism and The Seduction of Shareholder Orientation. In addition to discussing these topics, she managed to interject some of our ASPE Canon's into her talk. After her talk, our own John Heusner gave a short talk on "How the ASPE Canons Can Affect Ethical Decision Making." John not only touched on the ASPE Canons (please see the [attached](#) ASPE Code of Ethics) but also talked about the "Recommended Bidding Procedures," which is [available](#) from the ASPE National Website.



*Michael Moyers, CPE*

On another note, we have had a change in our Annual Golf Tournament. Due to unforeseen circumstances, we are going to postpone the date of June 26<sup>th</sup> to sometime in July. Please disregard the flyer that was sent out last week. Within the next week or so, a new flyer will be issued with the new date and times. Location will still be at the Riverwalk Golf Course in Mission Valley.

**Membership Status:** As of the most recent Chapter Roster issued April 2015 by SBO (Society Business Office), we have a total of 65 members. Currently we have 22 members who are CPEs and one FCPE. As a reminder to all members, if you have changed jobs, are in-between jobs, retired or have had to relocate, please update your status/contact information online at [www.aspenational.org](http://www.aspenational.org). Remember, to login, your User ID is your membership number, and your default password is your email address. You can also contact your Chapter Membership Chairman for assistance at [michael.moyers@bestinteriors.net](mailto:michael.moyers@bestinteriors.net).

**New Members:** This month we would like to welcome **Jerry Perez** of J&RP Development Corp.

**Chapter Elections:** Our Chapter Nominations Committee is currently in the process of soliciting nominations for Chapter Officers (President, 1<sup>st</sup> 2<sup>nd</sup> and 3<sup>rd</sup> Vice Presidents, Treasurer, Secretary) and Board of Directors. Candidates will be announced at the April 21<sup>st</sup> Chapter meeting with voting held toward the end of April. New Officers and Directors will be announced at the June Chapter meeting and installed during the July Chapter meeting. Remember, this YOUR Chapter! Please vote!

**Certification (CPE):** ASPE Certification is the highest form of professional recognition an individual estimator can receive and is being sought by more construction estimators each and every year. Through its Certification Program, the American Society of Professional Estimators recognizes the estimating proficiency and ethical awareness of the Certified Professional Estimator (CPE). Please see the [attached](#) ASPE Certification Summary to this newsletter for more information, or go to the National Website at <http://www.aspenational.org/> under the Certification tab.

#### **Upcoming Events:**

- A. On April 21<sup>st</sup>, we will be having a site tour and presentation of the Altman Clinical and Translation Research Institute at UCSD. Our hosts for this tour and dinner meeting will be Rudolph and Sletten. Dinner will follow at the Sheraton La Jolla Hotel.
- B. Our next Board of Directors Meeting will be April 28<sup>th</sup>. Details to follow.
- C. For our May meeting, we have Vince Hundley of Smart Safety Group giving a presentation on "Safety is Everyone's Concern."
- D. The ASPE Annual Meeting and Estimating Summit will be held in San Diego June 25-28, 2015, at the Hilton San Diego Resort and Spa.

For those of you who have thought of becoming more involved in our Chapter, we have a need for a few people to serve on various committees. If you are interested, please contact me at (858) 737-7316 or e-mail me at [michael.moyers@bestinteriors.net](mailto:michael.moyers@bestinteriors.net).

**Michael D. Moyers, CPE**

Best Interiors, Inc.

*President*

*ASPE San Diego Chapter #4*

project, designed by Zimmer Gunsul Frasca Architects, is noteworthy because of its use of both concrete and structural framing elements and its state-of-the-art mechanical and electrical systems. The design group and the Building Advisory Committee have created inspiring solutions to the challenges of connecting CTRI staff to each other, to nearby clinical entities, and to the natural environment in the surrounding terrain. Its overall profile provides a pleasing diversity of angles with the five-sided polygon, and offers open, light-filled interior spaces.

What is the intended purpose of this facility and what components will be housed within its exterior walls?

The CTRI building will serve as the hub of UCSD's intensely collaborative research environment, allowing researchers the most fluid exchange of resources and ideas, and enhancing the ease of cooperation and teamwork on related endeavors. Translational medicine represents the future of healthcare, and the Altman CTRI serves as a bridge between UCSD's clinical and research programs. This concept brings together laboratory scientists and clinical investigators to better understand disease, develop new methods of treatment, and translate clinical research results into clinical practice, according to CTRI Director, Gary S. Firestein, M.D. The goal will be to bring discoveries from the laboratory bench to the bedside, while facilitating the training and education of the next generation of researchers. Qualcomm Chairman, Steve Altman, and his wife Lisa are responsible for donating \$10M, giving initial impetus to this project.

The "wet" research laboratories will be located below the street level in the three-story concrete structure to guard against vibrations that may adversely affect sensitive scientific equipment. The dry research laboratories, conference rooms, and administrative offices will be situated in the four-level above-grade steel structure. In addition, the facility will contain an animal vivarium and 135-seat lecture hall, and a café for occupants. Overall, the building measures 365,000 gross square feet on seven levels with a 110' long, covered, pier-supported pedestrian bridge to the Sulpizio Cardiovascular Center. The exterior skin features a combination of curtain wall, metal panels, and architectural concrete. During the foundation work, a 450' long soil nail wall was installed on the south side of the site. The construction team hopes to achieve LEED Gold with its array of sustainable design attributes. Ground was broken in 2013 with completion anticipated in early 2016. Rudolph & Sletten has a \$171M Construction Manager at Risk contract with the Owner.



[\(cont'd on pg 4\)](#)

The Site Tour and Dinner Meeting Presentation on Tuesday, April 21<sup>st</sup> appropriately kicks off our season of renown excursions to view the construction processes involved in completing distinctive buildings and difficult engineering undertakings. Our Site Tour hosts from Rudolph & Sletten will include Rick Guinn, Project Principal, and Kristy Jarvis, Project Manager.

## Schedule of Site Tour Activities for Tuesday, April 21, 2015

Registration - 5:00 PM to 5:30 PM (sign waiver forms)

PARK IN PARKING LOT P702; MEET AT JOBSITE ENTRANCE.

SEE [ATTACHED SITE MAP](#).

Site Tour – begins promptly at 5:30 PM

**Site Tour participants ONLY will pay \$10.00 per person including students.**

Following Site Tour, adjourn to Sheraton La Jolla Hotel for dinner.

**NOTE: PERSONAL PROTECTIVE GEAR REQUIRED!**  
**Hard Hats, Safety Glasses, Safety Vests, Gloves, Hard-Toed Shoes,**  
**Appropriate Clothing**



We will visit the following Site Tour Stations during the job walk:

### Lower Level 3 –

#### 1. Earthwork and Foundation

- Former site of Camp Mathews during World War II
- Soil nail wall
- Soil stabilization techniques

#### 2. Thermal Energy Storage Tank

- 1.44M gallon capacity
- Stores chilled water produced during “off-peak” hours to meet “on-peak thermal demands
- Uses stratification principles to separate cold and warm water

#### 3. Animal Vivarium

- Catwalk system
- Urethane floor coating
- Cages and equipment

#### 4. MEP Systems

- 13 Air Handlers delivering 360,000 CFM
- 4 70T Modular Heat Recovery Chillers
- 8 High Pressure Steam Boilers
- 4 Hot Water Boilers
- 1650 Chilled Beams
- Double-ended electrical unit substations



*(cont'd on pg 5)*

## Level 1 –

### 5. Lecture Hall

- 135 seats
- Architectural finishes

### 6. Structure

- Concrete – 8000 psi with 30% fly ash  
Coated reinforcing steel  
Embeds and piping/conduit sleeves through 10" slabs
- Steel – steel truss system  
stairs  
pedestrian bridge



## Schedule of Dinner Meeting Activities for Tuesday, April 21, 2015

Registration and Social Hour from 6:30 PM to 7:15 PM for those not attending Site Tour

Dinner service will begin promptly at 7:15 PM

Chapter Announcements including Pledge of Allegiance and Self-Introductions will occur during Dessert and Coffee.

Dinner Meeting Presentation will commence at 8:00 PM

Discussion Topics include:

- Review of Site Tour Highlights
- Pre-Construction Estimating Tasks
- Project Challenges

The Sheraton La Jolla Hotel will again serve as the venue for our April dinner. The hotel is located at 3299 Holiday Court in La Jolla, and we will be using one of the meeting rooms on the 2<sup>nd</sup> Floor. The most convenient parking can be found in an adjacent lot on the north side of the main building; just south of La Jolla Village Dr., west of I-5, and east of Villa La Jolla Dr. (enter through the back side of the Mobil service station located at the southeast corner of La Jolla Village Dr. and Villa La Jolla Dr.). Attendees will have their choice of Chicken Madeira, Flat Iron Steak, or Pasta Primavera at a cost of \$40.00 per person and \$25.00 per student.


Plan to join us on Tuesday, April 21<sup>st</sup> for our Chapter's first Site Tour of the year and what promises to be an outstanding program to interest and educate our Society. Invite members of your firm, your subcontractors, and other colleagues in the construction industry. Contact Meredith Stumpo with Turner Construction Co. to make your reservations today.

Telephone: (858) 217-0756 Email: [mstumpo@tcco.com](mailto:mstumpo@tcco.com)

### Frank E. Young, FCPE

*Programs Committee Chair  
ASPE San Diego Chapter #4*





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**Meet the Members of Your Chapter Board ...**  
**Focus on MEREDITH STUMPO, E**  
**Senior Estimating Engineer**  
**Turner Construction Company**



*Meredith Stumpo E*

**M**eredith Stumpo has been in the construction industry since 1996. She graduated from the University of Texas with a degree in Civil Engineering and went to work for a construction management company as a Project Engineer straight out of school. After working in the field for a number of years, she transitioned to estimating in 2004 and hasn't looked back.

Meredith started working for Turner Construction in 2008 in their Chicago office and transferred to San Diego in 2011. She has worked in Preconstruction on many types of projects from K-12 schools, higher-ed, healthcare, mixed-use, aviation, residential and everything in between. She enjoys being part of Preconstruction and seeing projects evolve through design to what ultimately gets built.

In her spare time, Meredith likes to hike, go bike riding, and volunteer time with local community groups. ■

**JOB OPPORTUNITY:**  
**Estimator for Health Care General Contractor in Southern California**

**P**rovides professional estimating, cost engineering, and project control activities for Kaiser Permanente construction and/or refurbishment projects for hospitals, medical offices, regional buildings and other medical facilities. Responsible for all phases of estimating, cost engineering and project control functions to include but not limited to: budget/feasibility, conceptual, preliminary, and final construction estimates; contractor bid reviews; change order reviews, analyses and negotiations; alternative analyses evaluation; productivity analyses; and use of cost estimating computer technology where applicable. Develops and implements project cost engineering standards and procedures. Establishes the project work breakdown structure.

**The successful candidate will require the following Knowledge, Skills and Abilities:**

Estimating different types of contracts (*i.e.*, lump sum, GMP, CM at Risk, Design-Build). Reading, analyzing, interpreting and generally understanding contracts, plans, specifications, construction cost data, and other contract documentation necessary to identify project scope, risk and opportunity. Demonstrate proficiency in M/S Word, Excel, On-Screen Take-off and other data base applications. Understanding of unit pricing, time management / ability to multi-task.

Education: Four-year degree in construction management may be substituted with minimum of four years relevant experience and/or training / ASPE (CPE) certification.

Please send resume to: [John.T.Balistreri@KP.org](mailto:John.T.Balistreri@KP.org)

# ASPE San Diego Chapter #4 Scholarships

by Dan Luckhardt, CPE

*Senior Estimator, Balfour Beatty*

**O**n behalf of The American Society of Professional Estimators Scholarship Committee, I am pleased to announce the acceptance period for the '2015 Scholarship Application.' Our mission statement is as follows:

**Mission Statement:** *"The American Society of Professional Estimators serves construction estimators, by providing education, fellowship and opportunity for professional development."*

**Our Vision:** *"In its educational pursuits, ASPE strives to be the recognized leader in providing quality programs to benefit the cost estimating profession and the construction industry."*

*San Diego Chapter #4's Scholarship Awards are designed to promote student involvement in chapter affairs, and to reward deserving students who exhibit a sincere interest in education and the construction industry, as demonstrated by their work experience and personal statements.*

As ASPE members and individuals affiliated with our profession, it is my hope we raise the bar this year and simply get the word out to qualified candidates. Please take the time to reach out to professionals in our industry. These individuals may be working professionals or full-time students currently enrolled within an educational institution with aspirations of working within the construction industry. Please refer to the Scholarship 'Eligibility' requirements within the Scholarship Application, and or feel free to contact me, Daniel Luckhardt, Scholarship Committee Chairman, by e-mail or phone.

## Recommendations to applicants:

- ✓ **Submission deadline: Friday, May 15, 2015.** Please refer to the application instructions.
- ✓ Eligibility requirements: Please review the requirements and feel free to ask questions early in the application preparation process.
- ✓ Application: Please allow time in your schedule to solicit letters of recommendations.

As part of our monthly newsletter you will find the 'Eligibility, Requirements, and the Application' [attached](#) in a PDF format. Again, on behalf of the Scholarship Committee, we look forward to receiving and reviewing applications for Scholarship Award considerations.

Good Luck!

**Daniel Luckhardt, CPE**

Balfour Beatty Construction

*Scholarship Award Committee Chairman*

*ASPE San Diego Chapter #4*

[dluckhardt@balfourbeattyus.com](mailto:dluckhardt@balfourbeattyus.com)

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### **FOR MORE INFORMATION:**

Contact **LAURA PARKER, CPE**  
619.704.2914 (ofc); 619.977.2817 (cell)  
OR [lauraparkercpe@gmail.com](mailto:lauraparkercpe@gmail.com)



## **ASPE MISSION STATEMENT**

The American Society of Professional Estimators serves construction estimators by providing education, fellowship and the opportunity for professional development.

[Click here for ASPE's CODE OF ETHICS.](#)

## **ASPE Membership**

An accurate cost estimate is the first of many key components of a successful construction project. Plan interpretation, labor and material costs, scheduling costs, and level of difficulty recognition are a fraction of the skills necessary to become a successful estimator.

Why join the American Society of Professional Estimators? ASPE is the most recognized and credentialed group of construction cost professionals in our nation's construction industry. ASPE provides education, industry information, and fellowship to all levels of our members. It is made up of professionals of several different classifications.

- A- **Estimator**—shall have at least five years' experience as an estimator in one or more of the construction estimating disciplines.
- B- **Constructor**—shall be an active construction professional experienced in one or more of the construction disciplines with at least 5 years' experience.
- C- **Associate Member**—is a Member with less than 5 years of experience as an estimator or an active construction professional. When the Member achieves 5 years of experience, the Member shall be given one of the Member classifications listed above.

One of the ultimate goals of a member in ASPE is to achieve status as a "Certified Professional Estimator," otherwise know as "CPE." CPE status is recognized by Builders, Government Agencies, Developers, and many other Corporate entities as the highest level of qualification as an estimator. Educational training is available to become part of this elite group of professionals.

ASPE San Diego Chapter 4 is perennially recognized as one of the top chapters of the nation's 50 chapters. The local chapter meets on the third Tuesday of each month. This general membership meeting offers education and insight into our industry. Each membership meeting is highlighted by presentations and guest speakers, with information pertinent to our ever-changing industry.

If you would like to become part of this exciting group of professionals, please contact Michael Moyers CPE at:

[michael.moyers@bestinteriors.net](mailto:michael.moyers@bestinteriors.net) 858.737.7316



# ASPE San Diego Chapter #4

## CALENDAR OF EVENTS

◆ **Tuesday, April 21, 2015 — 5:00 PM Registration**

**ASPE San Diego General Membership Dinner Meeting**

**Tentative Program:** Site Tour and Presentation for Altman Clinical & Translational Research Institute at UCSD La Jolla

**Hosts:** Rudolph & Sletten, Inc.

**Dinner:** Sheraton La Jolla Hotel

**Venue:** 3299 Holiday Court, La Jolla

◆ **Tuesday, April 28, 2015 — 5:30 PM**

**ASPE San Diego Board of Directors' Meeting**

**Location:** To be determined

◆ **Friday, May 15, 2015 — 7:00 AM to 4:30 PM**

**ASPE San Diego Estimating Seminar**

**Location:** National University Technology & Health Sciences Center  
3678 Aero Court, San Diego (Kearny Mesa)

[Click here](#) for 5/15 Estimating Seminar Flyer.

◆ **Tuesday, May 19, 2015 — 5:00 PM Registration**

**ASPE San Diego General Membership Dinner Meeting**

**Program:** Safety Is Everyone's Concern  
**Principal Speaker:** Vince Hundley, President & CEO  
**SMART Safety Group**  
**In-House Speakers:** Paul Chang and Paul Sprecco  
**Sundt Construction**  
**Dinner:** Sheraton La Jolla Hotel  
**Venue:** 3299 Holiday Court, La Jolla

◆ **Tuesday, May 26, 2015 — 5:30 PM**

**ASPE San Diego Board of Directors' Meeting**

**Location:** To be determined

◆ **Friday, June 5, 2015 — 1:00 PM to 4:30 PM**

**ASPE San Diego Bid Day Simulation**

**Location:** National University Technology & Health Sciences Center  
3678 Aero Court, San Diego (Kearny Mesa)

◆ **Tuesday, June 16, 2015 — 5:00 PM Registration**

**ASPE San Diego General Membership Dinner Meeting**

**Tentative Program:** Site Tour and Presentation of Project  
To be determined

**Dinner:** To be determined

**Venue:**

**Location:** To be determined

◆ **Tuesday, June 23, 2015 — 5:30 PM**

**ASPE San Diego Board of Directors' Meeting**

**Location:** To be determined

◆ **Wednesday, June 24, 2015 to Sunday, June 28, 2015**

**ASPE Annual Meeting and Estimating Summit**

**Location:** Hilton San Diego Resort and Spa  
1775 E. Mission Bay Drive, San Diego

**IMPORTANT NOTICE:**


**ASPE San Diego Chapter Golf Tournament  
Has Been Postponed until July or August**



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General Manager  
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# GET INVOLVED IN YOUR LOCAL CHAPTER !!!



## TECHNICAL COMMITTEES:

### Certification:

John Heusner, CPE

### Education:

Dan Luckhardt, CPE

### Standards:

John Heusner, CPE

## STANDING COMMITTEES:

### Chapter Awards

### National Awards

### Nominations:

Frank Young, FCPE

### Bylaws:

Michael Moyers, CPE

### Parliamentarian:

*PENDING*

### Communications/ Newsletter

### Website:

John Balistreri, CPE

### Finance

### Ways & Means:

Laura Parker, CPE

### Historical:

*PENDING*

### Public Relations

### Calendar:

*PENDING*

### Membership:

Michael Moyers, CPE

### Programs:

Frank Young, FCPE

## OTHER COMMITTEES:

### Ethics:

*PENDING*

### Mentoring:

Frank Young, FCPE

### Scholarships:

Dan Luckhardt, CPE

### Telephone:

Meredith Stumpo

## 2014-2015 Chapter Officers

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<b>2<sup>nd</sup> Vice-President</b>	John Balistreri, CPE Kaiser Permanente	619.589.3080 619.861.1131-C	619.589.3192	<a href="mailto:john.t.balistreri@kp.org">john.t.balistreri@kp.org</a>
<b>3<sup>rd</sup> Vice-President</b>	VACANT			
<b>Secretary</b>	James Yu, E Cumming Corp. USA	858.217.3574 858.273.9491-C	858.673.9263	<a href="mailto:jyu@ccorpusa.com">jyu@ccorpusa.com</a>
<b>Treasurer</b>	Laura Parker, CPE	619.704.2914 619.977.2817-C	858.278.7922	<a href="mailto:lauraparker@ccpe@gmail.com">lauraparker@ccpe@gmail.com</a>
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<b>Executive Administrator</b>	Margy Ashby	619.749.1890 619.593.9988 619.302.3257-C		<a href="mailto:info@aspechapter4.org">info@aspechapter4.org</a> <a href="mailto:asped4@gasvcs.net">asped4@gasvcs.net</a>
<b>Webmaster</b>	Sharon Jones	619.749.0597	619.749.7097	<a href="mailto:acsolution@cox.net">acsolution@cox.net</a>

## 2014-2015 Chapter Board of Directors

Director	Phone	Fax	Email
Hendrik Degenaar, CPE Gafcon Inc.	619.231.6100 858.717.3198-C	619.231.6995	<a href="mailto:hdegenaar@gafcon.com">hdegenaar@gafcon.com</a>
John W. Heusner, CPE CRB Builders	760.444.3319	760.496.3711	<a href="mailto:johnwheusner@san.rr.com">johnwheusner@san.rr.com</a>
David Luhm Alpha Mechanical	858.279.1300 x519 760.238.3355-C	858.278.3510	<a href="mailto:dluhm@alphamechanical.com">dluhm@alphamechanical.com</a>
Meredith Stumpo Turner Construction	858.217.0756 858.342.0803-C	858.217.0695	<a href="mailto:mstumpo@tcco.com">mstumpo@tcco.com</a>
Paul Chang, E Sundt Construction (Alternate)	619.321.4800 619.430.3361-C	619.321.4932	<a href="mailto:pmchang@sundt.com">pmchang@sundt.com</a>



Published by San Diego Chapter 4  
 American Society of Professional Estimators

# S.D. Mator

## Register Today!

For the Tuesday, April 21, 2015  
 ASPE San Diego Chapter #4  
 Site Tour and Dinner Meeting ...

**UCSD's Altman Clinical and  
 Translational Research Institute**

### CONTACT US

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 El Cajon, CA 92020-2955

Phone: 619.749.1890

Email: [info@aspechapter4.org](mailto:info@aspechapter4.org)

Web: <http://www.aspechapter4.org>

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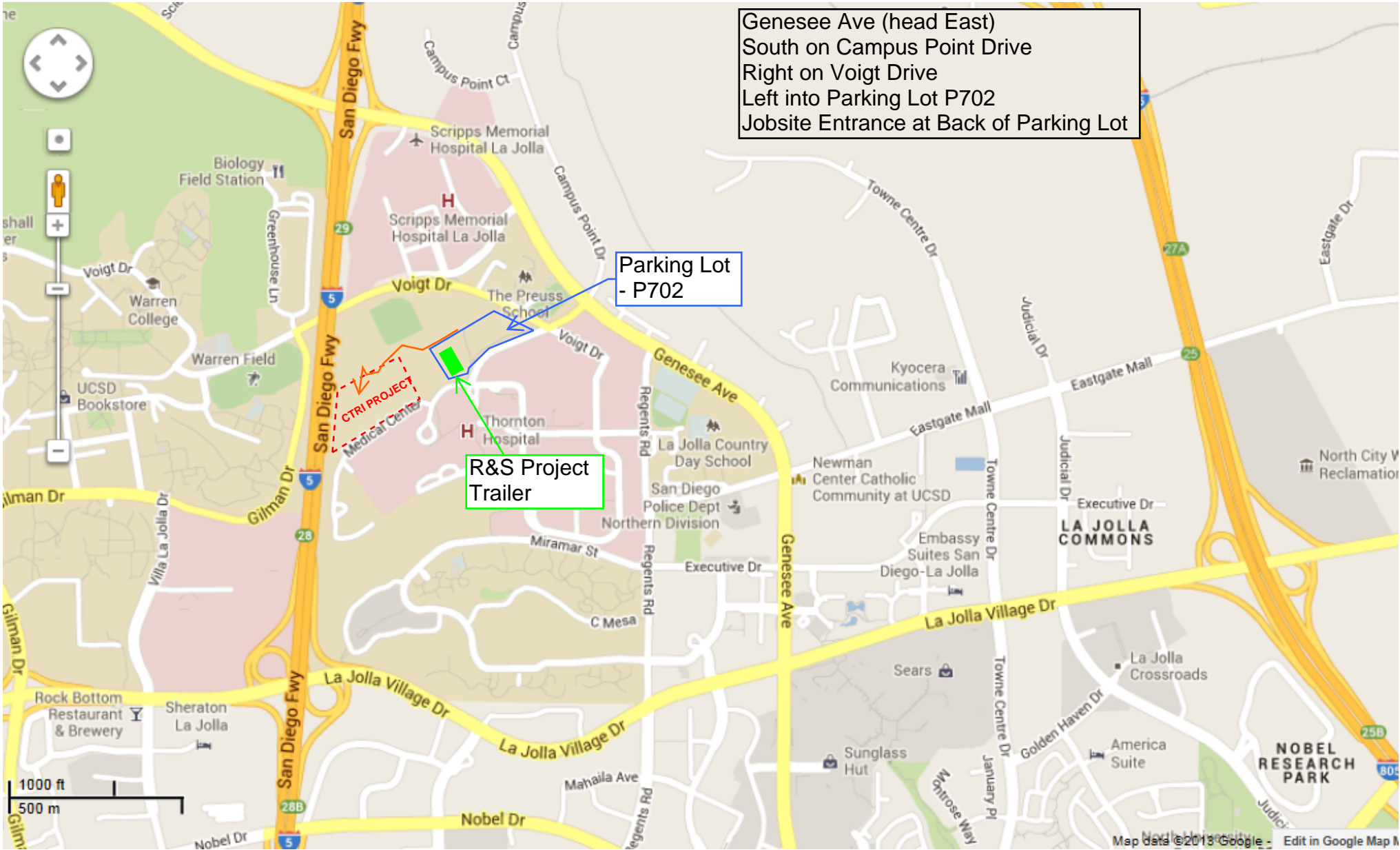
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# Map to: UCSD Altman CTRI Construction Project

## 3753 Voigt Drive, UC San Diego, 92037



***The American Society of Professional Estimators  
Code of Ethics***

**Introduction**

The ethical principles presented are intended as a broad guideline for professional estimators and estimators in training. The philosophical foundation upon which the rules of conduct are based is not intended to impede independent thinking processes, but is a foundation upon which professional opinions may be based in theory and in practice.

Please recognize that membership in and certification by the American Society of Professional Estimators are not the sole claims to professional competence but support the canons of this code.

The distinguishing mark of a truly professional estimator is acceptance of the responsibility for the trust of client, employer and the public. Professionals with integrity have therefore deemed it essential to promulgate codes of ethics and to establish means of insuring their compliance.

**Preamble**

The objective of the American Society of Professional Estimators is to promote the development and application of education, professional judgment and skills within the industry we serve. Estimators must perform under the highest principles of ethical conduct as it relates to the protection of the public, clients, employers and others in this industry and in related professions.

The professional estimator must fully utilize education, years of experience, acquired skills and professional ethics in the preparation of a fully detailed and accurate estimate for work in a specific discipline. This is paramount to the development of credibility by estimators in our professional service.

Estimating is a highly technical and learned profession and the members of this society should understand their work is of vital importance to the clients and to the employers they serve. Accordingly, the service provided by the estimator should exhibit honesty, fairness, trust, impartiality and equity to all parties involved.

**Canon #1**

*Professional estimators and those in training shall perform services in areas of their discipline and competence.*

1. Estimators shall to the best of their ability represent truthfully and clearly to a prospective client or employer their qualifications and capabilities to perform services.
2. The estimator shall undertake to perform estimating assignments only when qualified by education or years of experience in the technical field involved in any given assignment.
3. The estimator may accept assignments in other disciplines based on education or years of experience as long as qualified associate, consultant or employer attests to the accuracy of their work in that assignment.

4. An estimator may be subjected to external pressures to perform work above or beyond qualifying education and experience. Estimators must retain their integrity and professionalism by actively avoiding involvement in situations that may lead to loss of independence and integrity as a professional estimator.

**Canon #2**

*Professional estimators and those in training shall continue to expand their professional capabilities through continuing education programs to better enable them to serve clients, employers and the industry.*

- 1) A member of the American Society of Professional Estimators will strive to gain the honored position of “Certified Professional Estimator” and encourage others to obtain this honored position.
- 2) Members will lend personal and financial support, where feasible, to the schools and institutions engaged in the education and training of estimators.
- 3) Members will cooperate in extending the effectiveness of the profession by interchanging information and experience with other estimators and those in training to be estimators, subject to legal or proprietary restraints.
- 4) Members will endeavor to provide opportunity for the professional development and the advancement of estimators and those in training under their personal supervision.

**Canon #3**

*Professional estimators and those in training shall conduct themselves in a manner that will promote cooperation and good relations among members of our profession and those directly related to our profession.*

- 1) Treat all professional associates with integrity, fairness, tolerance and respect, regardless of national origin, race, sexual orientation, religion, gender or age.
- 2) Extend fraternal consideration when giving testimony that may be damaging to a member of our society, as long as it does not violate this Code of Ethics and the laws governing the proceedings.
- 3) Accept the obligation to assist associates in complying with the code of professional ethics. The professional character of our society is dependent upon continuing mutual cooperation with one another. It is an essential element of our continued success.
- 4) Recognize the ethical standards set by other professionals, such as architects and engineers, directly related to our industry and extend to them the common courtesies they deserve.
- 5) Act honorably, both in personal and professional life, by avoiding situations that may erode public respect.

**Canon #4**

*Professional estimators and those in training shall safeguard and keep in confidence all knowledge of the business affairs and technical procedures of an employer or client.*

- 1) Privileged information or facts pertaining to methods used in estimating procedures prescribed by an employer, except as authorized or required by laws, shall not be revealed.
- 2) Treat in strict confidence all information concerning a client's affairs acquired during the fulfillment of an engagement and completion of an estimating procedure.
- 3) Serve clients and employers with professional concern for their best interests, provided this obligation does not endanger personal integrity or independence.

**Canon #5**

*Professional estimators and those in training shall conduct themselves with integrity at all times and not knowingly or willingly enter into agreements that violate the laws of the United States of America or of the states in which they practice. They shall establish guidelines for setting forth prices and receiving quotations that are fair and equitable to all parties.*

- 1) By not participating in bid shopping. Bid shopping occurs when a contractor contacts several subcontractors of the same discipline in an effort to reduce the previously quoted prices. This practice is unethical, unfair and is in direct violation of this Code of Ethics.
- 2) By not accepting quotations from unqualified companies or suppliers. Every effort should be made to pre-qualify any bidder to be used.
- 3) By not divulging quotes from subcontractors and suppliers to competitors prior to bid time in efforts to drive down the prices of either. Should quotes be received from subcontractors or suppliers that are excessively low or appear to be in error, the firm should be asked to review its' price. When making this request the quotes of others shall not be divulged.
- 4) By not padding or inflating quoted bid prices. An unethical practice for professional estimator is to pad or inflate quotes when bidding with firms known for bid shopping. If not a violation of applicable laws, a professional estimator should not provide quotes to known bid shoppers. However, it is not unethical to submit quotes with different values to different contractors, provided there are sound business reasons to justify the differences in the quotes.
- 5) Professional estimators shall not enter into the unethical practice of complimentary bids (also known as comp bids). Complimentary bidding is a violation of this Code of Ethics.

**Canon #6**

*Professional estimators and those in training shall utilize their education, years of experience and acquired skills in the preparation of each estimate or assignment with full commitment to make each estimate or assignment as detailed and accurate as their talents and abilities allow.*

- 1) To formulate an accurate estimate in any discipline, a full review must be made of all related documents. Any other approach could cause errors or omissions that may endanger professional integrity and reliability.

- 2) It is of paramount importance to a professional estimator to minimize the possibility of making mistakes or errors. The more detailed the estimate, the better the accuracy will be.
- 3) Each estimate should be cross checked by means that will insure that it is technically and mechanically free from mistakes, oversight or errors. If possible and feasible, estimates should be checked by other professionals. If it is not feasible for someone else to cross check an estimate, the estimator should cross check their own estimate by utilizing a different method, such as using historical data or unit prices based on previous cost data on similar project.

#### **Canon #7**

*Professional estimators and those in training shall not engage in the practice of bid peddling as defined by this code. This is a breach of moral and ethical standards, and a member of this society shall not enter into this practice.*

- 1) Bid peddling occurs when a subcontractor approaches a general contractor with the intent of voluntarily lowering the original price below the price level established on bid day. This action implies that the subcontractor's original price was either padded or incorrect. This practice undermines the credibility of the professional estimator and is not acceptable
- 2) The same procedure applies to a professional estimator engaged as a general contractor, as defined in the previous paragraph, when the estimator approaches an owner or client to voluntarily lower the original bid price.
- 3) When a proposal is presented, the professional estimator is stating the estimate has been prepared to the best of their ability using their education, expertise and recognized society standards. Entering into unethical practices such as "bid peddling" jeopardizes both personal and society professional credibility, while violating the trust of the clients.
- 4) This canon does not consider the practice of the solicitation of a "best and final offer" to be unethical. Where permissible by law and authorized by the procurement authority, an estimator may request a best and final offer from his subcontractors and suppliers, but must keep the value of the original quotations strictly confidential.

#### **Canon #8**

*Professional estimators and those in training to be estimators shall not enter into any agreement that may be considered acts of collusion or conspiracy (bid rigging) with the implied or express purpose of defrauding clients. Acts of this type are in direct violation of the code of ethics of the American Society of Professional Estimators.*

- 1) Bid rigging, collusion and conspiracy, as defined by the American Society of Professional Estimators, may occur between two (2) or more parties. Agreements reached by companies or individuals in the act of conspiring to set the price of a particular project or scope of work with the express purpose of circumventing the competitive bid process are illegal and a violation of this Code of Ethics.
- 2) Professional estimators and those in training to be estimators shall not be associated with firms which are known to participate in the practice of bid rigging.



- 3) There are no conditions that will allow a professional estimator to enter into such fraudulent acts such as bid rigging, knowing that they are held to be unlawful, immoral, unethical and unacceptable to this society.

**Canon #9**

*Professional estimators and those in training to be estimators shall not participate in acts such as the giving or receiving of gifts, which are intended to be or may be construed as being acts of bribery.*

- 1) Professional estimators and those in estimating should not offer cash, securities, intangible property rights or any personal items in order to influence or that give the appearance of influencing the judgment or conduct of others that would place them in the position of violating any laws or leave them with the feeling of obligation or indebtedness.
- 2) Professional estimators and those in training should not accept gifts, gratuities or entertainment that would place them in a position of violating and laws (municipal, state or federal) or that give the appearance of creating an inducement which would affect the estimator's professional credibility by placing them in a position of obligation or indebtedness.

*Revision May, 2011*

# ASPE Certification



CESB  
Accredited  
Program



**American Society of Professional Estimators**

# Top 10 Reasons to Become ASPE Certified

Everybody knows that MD following an individual's name means Medical Doctor. And most people know that CPA signifies Certified Public Accountant. Associations and professions use certification to recognize qualified and competent individuals. The certification process is one of the single most important steps in career development. Here are the top ten reasons an estimating professional should consider becoming ASPE-Certified.

- 1. Certification grants you professional credentials.**
- 2. Certification demonstrates your commitment to the industry and estimating profession.**
- 3. Certification enhances the profession's image.**
- 4. Certification reflects personal achievement.**
- 5. Certification builds self-esteem.**
- 6. Certification can improve career opportunities and advancement.**
- 7. Certification may provide for greater earning potential.**
- 8. Certification improves skills and knowledge.**
- 9. Certification prepares you for greater on-the-job responsibilities.**
- 10. Certification offers greater recognition from peers.**



# ASPE Certification

The Certification of Professional Estimators is an acknowledgment that you have met, and continue to meet, the criteria established for this designation as determined by the American Society of Professional Estimators (ASPE). Attaining this recognition requires continuing commitments to ethics, education, and employment. It is a commitment by the individual to the construction industry and to ASPE.

ASPE certification is the highest form of professional recognition an estimator can receive. Through its certification program, ASPE recognizes the estimating proficiency and ethical awareness of the Certified Professional Estimator (CPE).

CPE recognition is being sought and attained by an ever growing number of construction estimators each year. It is the only program of its kind to attest that a construction estimator has met the necessary educational and experience requirements and has the capabilities required of our profession.

With such diversity of backgrounds among estimators, the development of programs for both education and certification of professional construction estimators has been a demanding and rewarding process. For all the varied disciplines and levels of detail, the fundamental principles of construction cost estimating remain universally applicable. Beyond these fundamentals, however, the realms of varied disciplines make construction estimating one of the most unique challenging, and fulfilling professions an individual may pursue.

ASPE recognizes the fundamental estimating principles inherent to all types of construction estimating. Whether for general, mechanical, electrical, or specialty disciplines, or for an owner, designer or contracting firm, the estimator requires knowledge that is applicable in virtually all circumstances.

Each candidate seeking certification must meet five basic requirements.

- Experience—Minimum of Five Years
- Completion of Orientation Workshop
- Technical Writing Abilities
- Communication Skills
- Successful completion of Certification Examinations.

The Certification Committee then evaluates each of the criteria for conformance to the program.

ASPE has established that a CPE candidate must possess a minimum of five years of estimating experience in a specific discipline to be accepted into the certification program.

All candidates seeking certification must complete an orientation workshop. This workshop provides the candidate with an overview of the requirements and guidelines of the certification process.

Communication Skills and knowledge of estimating must be demonstrated to the Certification Board. This is done through the writing of a technical paper on a subject approved by the Board.

The certification exam is designed to evaluate the CPE candidate's overall knowledge of estimating. It includes quantities, contract terms and conditions, cost reporting, ethics, and other fundamentals of estimating. The exams consist of a General Estimating Knowledge Exam (GEK) and a Discipline Specific Test (DST). The DST concentrates on specific practices such as General Contracting, Mechanical, Electrical, Excavation, and Concrete estimating. Preparation for the exam is recommended. A candidate will not be notified of CPE status until all requirements of the certification process have been passed.

Once recognized as a CPE, the estimator will be expected to keep abreast of current trends and improved practices in the construction industry. Conformance is measured under the provisions of the Certification Renewal Program. This program requires renewal of certification every three years. See the Renewal Program Guidelines for further details.

Professional evaluation through certification is one of many ways the American Society of Professional Estimators endeavors to promote the profession and benefit the construction industry.



# NEWS FROM THE SBO

(SOCIETY BUSINESS OFFICE)

DATE: 4.3.15



**UPCOMING DEADLINES**

**PLEASE DISTRIBUTE TO ALL CHAPTER MEMBERS**

<b>April 15</b>	<b>Last Day to Vote— Last Day to report to SBO any chapter dues changes—Nominations for Estimator of Year, Fellow, HM</b>
<b>April 29</b>	<b>All Annual meeting reports do to Governors and Vice Presidents</b>
<b>May 1</b>	<b>Nominations for Chpt President of Year due to SBO</b>
<b>June 1</b>	<b>Delegate voting strength determined by SBO-Return ASAP</b>
<b>June 24-28</b>	<b>Annual Meeting &amp; Estimators Summit in San Diego, CA</b>
<b>June 27</b>	<b>2015-2016 BOT Takes Office</b>

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\*Additional downloads may be purchased after purchasing an option above.

**SAN DIEGO 2015**

American Society of Professional Estimators  
Annual Meeting | Estimator Summit  
June 24-28, 2015

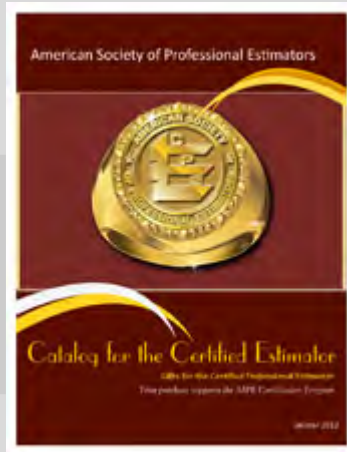
**↑ UPDATED ↑**

Are your members receiving news from the SBO? We have some members that their emails are bouncing. Please check with your chapter!!

**Recommended Bidding Procedures 7th Edition**

The latest version of the Recommended Bidding procedures is now located under the resources tab then under publications

Are you a CPE or are you going thru the program? Check out the CPE items online under the certification tab!



### Website Login Confusion

Our members appear to be having some confusion over their login information. Please make a note of the following:

User Id = Membership #  
Password = Email address

**Invite a new member to join ASPE!!!**

**Remember there is an award each year for the member that brings in the most new members...  
Make that award YOURS!!!!**

# Directory Login

You can now download your chapter reports for the most current information. Below you will find step-by-step instructions on how to download the reports once logged into the database.

1. Click the My homepage button

2. Click the library tab

American Society of Professional Estimators  
"Serving construction estimating professionals ~ since 1956"

Log off

Links: aspenational.org

Members:

- My Home Page
- Change my Password
- Renew Your Membership
  - Amount Due \$250
  - Current: Renewal is July 2013 and Expires on 7/31/2013
- Search (enter your criteria, press find)

choose from list, press submit

Region	
(choose region 1st) Chapter #	
choose for list Class	
partial ok Company	
partial ok Name	
partial ok City	
2 digit abbreviation State	

2525 Perimeter Place  
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Modified By: Tina

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How can we help? Buy Online or Call 615-316-9200

Your Member ID: [redacted]

Your Requests / Orders With Us  
View your Orders. Finish or Delete if Status is "incomplete"

	Date	No.	Type	Status	[ office alerts ]	Fees	Paid
view	9/11/12	12373	Cart	Done		\$280.00	P
view	8/29/11	9651	Cart	Done		\$250.00	P
view	9/7/10	7233	Cart	Done		\$250.00	P
view	9/3/08	4914	Cart	Done		\$250.00	P
view	7/8/08	617	Cart	Done		\$250.00	P

Renewal Period Starts: Tue 09.11.12  
Renewal Period Ends: Mon 07.01.13

Paid: \$1,280.00  
Not Paid: [empty]

New Request

Modified by: Tina

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National Board Members in your Chapter No. 6

1 Chapter President and Alternate in your Chapter No. 6									
Eaton	Scott	(480) 557-4700	seaton@tcco.com						

Region	Chapter #	Arizona (Phoenix)	Total Members	E	ME	C	S	ASM	AF	HM
SW	6	Arizona (Phoenix)	63	55	1			3	4	

Downloads

ALL CP NE NW SE SW

3. Pick your region and it will download to excel



**American Society of Professional Estimators  
San Diego Chapter #4**

**2015  
UNDERGRADUATE COURSES  
SCHOLARSHIP PROGRAM**

**Eligibility, Requirements, Awards  
and Application**

**Submission Deadline:**

Applications and Reference Letters must be mailed to:  
The ASPE San Diego Chapter #4 Scholarship Committee  
and postmarked on or before Friday, May 15, 2015

**Mail to:**

ASPE San Diego Chapter #4 Scholarship Committee  
c/o Dan Luckhardt CPE or Frank E. Young FCPE  
Balfour Beatty Construction  
10620 Treena Street, Suite 300  
San Diego, California 92131-2433

**If you have questions, please contact:**

ASPE San Diego Chapter #4 Scholarship Committee  
**Daniel Luckhardt**  
[dluckhardt@balfourbeattyus.com](mailto:dluckhardt@balfourbeattyus.com) or (619) 633.8925



**Mission Statement:** “The American Society of Professional Estimators serves construction estimators, by providing education, fellowship and opportunity for professional development.”

**Our Vision:** “In its educational pursuits, ASPE strives to be the recognized leader in providing quality programs to benefit the cost estimating profession and the construction industry.”

San Diego Chapter #4’s Scholarship Awards are designed to promote student involvement in chapter affairs, and to reward deserving students who exhibit a sincere interest in education and the construction industry, as demonstrated by their work experience and personal statements.

### **ELIGIBILITY**

1. Applicant may be currently taking undergraduate accredited courses.
2. Applicant must be employed in the construction industry, preferably working for an ASPE Member-Firm.

### **REQUIREMENTS**

1. Applications must be submitted in hardcopy/original format.
2. Applicant is responsible for ensuring that all items listed below are included in the submittal package and postmarked on or before **May 15, 2015**.
  - a) Completed and signed application.
  - b) Personal statement.
  - c) Letters of recommendation.
3. Applicant must be able to attend ASPE San Diego Chapter #4’s Awards Dinner on Tuesday, July 21, 2015 between the hours of 5:30 p.m. and 8:30 p.m. at a location to be determined in general San Diego area.

### **AWARDS**

1. A scholarship in the amount of \$500.00\* will be awarded.
2. Applications will be reviewed by the ASPE San Diego Chapter #4 Scholarship Committee. Attention and consideration will be given to work experience; applicant’s expressed interest in furthering his/her education, goals in the construction industry, and references.
3. Designees will be notified by June 5, 2015.
4. Award will be made and check distributed during the Awards Dinner.

Non-Discrimination Clause:

The American Society of Professional Estimators is an Equal Opportunity Organization and encourages applications from all individuals.

\*The amount of the scholarship is subject to change.





## **2015 SCHOLARSHIP APPLICATION**

Please limit application form to 3 pages and restrict your personal statement to 2 pages.

### **PERSONAL INFORMATION**

Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Telephone \_\_\_\_\_ E-Mail \_\_\_\_\_

I would like to be contacted about internship opportunities with ASPE Member-Firms.

### **SCHOLASTIC INFORMATION**

List of ASPE Online Courses already taken by applicant:

\_\_\_\_\_  
\_\_\_\_\_

Previous College or University education:

\_\_\_\_\_  
City, State: \_\_\_\_\_

Area of concentration: \_\_\_\_\_

Degree anticipated: \_\_\_\_\_

ASPE San Diego Chapter #4

**2015 SCHOLARSHIP APPLICATION**

Professional or School Affiliations (List participation in any school, professional or community activities including offices held and awards received):

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**EMPLOYMENT HISTORY**

Work Experience (List full-time, part-time, co-op and summer employment. Briefly describe duties and responsibilities.):

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**RECOMMENDATION**

Letters of recommendation from ASPE member or job supervisor with personal knowledge of the applicant must accompany the application (maximum 2 letters).

**PERSONAL STATEMENT**

A statement about your career goals and why you think you should receive the scholarship award. Include information about:

- your career objectives
- how you and the construction industry can benefit each other
- your most important extracurricular activity

Statement should not exceed 500 words or (2) pages. Please attach to application form.

*I agree that the application and all attachments may be used for the purposes of evaluation and selection by the ASPE San Diego Chapter #4 Scholarship Committee.*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**APPLICANT: You have the responsibility to ensure that the application, all forms, letters are postmarked on or before **May 15, 2015** and received by the ASPE San Diego Chapter #4 Scholarship Committee.**



When: Friday, May 15, 2014 – 7:30 AM to 4:00 PM  
 Where: National University  
 3678 Aero Court, Room 114, San Diego, CA

Discover what the top local contractors are doing to win more work through the use of current and evolving technology, as well as historically successful processes.

<b>Cost of Seminar:</b>	<u>Early Bird Discount if submitted before May 1, 2015</u>	<u>After May 1, 2015</u>
Members and Guests	\$95.00	\$110.00
Students	\$75.00	\$80.00

This is an excellent opportunity for Chief Estimators to discover the latest innovations, Senior Estimators to uncover new ways to perform their job better and faster, and Junior Estimators to learn about “best practices” for their discipline. This educational seminar will prove to be invaluable, and at an affordable cost.

**Topics to be covered during the morning sessions:**

Innovative estimating tools and their implementation in both the General and Subcontractor Offices such as Prime Bid (Bid Management), Assemble (BIM Extraction), VICO Update(Integrated Project Management), Solibri (Competitor to VICO), Excel Tips & Tricks; Utilizing productivity-enhancing estimating software solutions such as Timberline & other database advantages, Bluebeam estimating applications, Quick Bid integration with Timberline, On Screen Takeoff linked with Excel estimating templates, new features of On Screen Takeoff Version 3.92.0.52 and techniques for “Whiz Bang Power Users,” Navisworks as an estimating tool.

Afternoon Track 1 - Why & How General Conditions/General Requirements Affect All Trades, Unique Earthwork & Site Work Estimating Characteristics, Masonry, Structural and Miscellaneous Metals, Rough Carpentry, Finishes (Stucco, Fireproofing, Metal Framing, Drywall and Acoustic Tile).

Afternoon Track 2 – HVAC, Plumbing, Fire Sprinklers, Process Piping, Electrical, Electrical Systems (Integrated Automation, Fire Alarm, Security, Low Voltage)

For questions or additional information, contact John Wayne Heusner at (760) 444-3319 (Direct Line) or send an email to [johnwayne.heusner@CRBusa.com](mailto:johnwayne.heusner@CRBusa.com).

Send registration and payment to: ASPE San Diego Chapter #4 – c/o Christiana Gerber Honnet, Waller Consulting  
 2111 W. California Street, San Diego, CA 92110

**REGISTRATION FORM:**

Name: \_\_\_\_\_ Phone # \_\_\_\_\_ E-Mail \_\_\_\_\_

Company Name \_\_\_\_\_ Amount Enclosed \$ \_\_\_\_\_

Pay by Check payable to: ASPE SAN DIEGO CHAPTER #4

OR PayPal (3.5% Convenience Fee Will Be Added) CC# \_\_\_\_\_ EXP \_\_\_/\_\_\_ CVC \_\_\_\_\_

Billing address \_\_\_\_\_ Signature \_\_\_\_\_

**A High Value Educational Opportunity Targeted Specifically  
 at the Professional Building Construction Estimator.**