



S.D. Mator



August 2015

Volume 14, Issue 1

From Our President



Michael D. Moyers, CPE

Greetings!
As one Fiscal Year closes, another has started. I can't believe that it has been a year since I first took oath and now I'm starting a second term as President. The time just flew by. We have had a few bumps this past year

in having to cancel a few meetings and the Education Seminar. But all in all, I think we had a fairly good year. We had a fantastic National Annual Meeting and Estimators Summit here in San Diego. All the reports I have gotten back from attendees were very favorable, and everyone seemed to have had a great time! Thanks to all of you who helped in some way or another to make this a smashing event. We have also had some great meetings and tours. The planning of our 9th Annual Golf Event paid off in big dividends, and everyone had a great time. Again, I would like to thank last year's Officers and Board of Directors for their service and dedication to the Chapter!

Our July meeting was fun and exciting. We started out the evening mingling while waiting for the dinner service. We were honored to have with us **TJ Schwertfeger**, our Southwest Regional Governor, as well as **George Welch** of **NewSchool of Architecture** and **Dr. Thais Alves** of **San Diego State University**.

After a few short announcements, we sat down and enjoyed a great dinner. Our keynote speaker was **Walt Fegley**, President of Reno Contracting & current President of the AGC San Diego Chapter. He gave an outstanding presentation entitled "ASSESSING OUR INDUSTRY—ENDURING THE UPS AND DOWNS OF THE PAST DECADE WILL HELP SHAPE OUR APPROACH TO THE CHALLENGES AHEAD."

Then we got into the good stuff. Dan Luckhardt presented the Scholarships to the three student winners ... **Alex Rizea**, **Elijah Elliott** and **David Calderon**. Congratulations to you all! Then came award time. We started by awarding the Certificates of Appreciation to the 2014-2015 Officers and Board members. We also recognized **Margy Ashby**, our Executive Administrator, and **Sharon Jones**, our Webmaster. I would like to thank again all those who served last term.

The Chapter Awards were then given out by yours truly, Frank Young and Hendrick Degenaar. TJ Schwertfeger was on hand to give out the Estimator of the Year Award. The recipients were as follows:

- "Jess Sisk Award" for Outstanding Committee Chair – **David Luhm**, Golf Committee
- "Larry Kian Award" for Outstanding Service to the Chapter – **Dan Luckhardt CPE**, Scholarship Committee
- President's Award for Outstanding Dedication – **John Heusner CPE**, Certification/Education Committees
- Officer of the Year for Outstanding Chapter Officer – **James Yu**, Secretary
- Member Firm of the Year – **Turner Construction**
- Special President's Award – **Meredith Stumpo** and **Paul Chang**, Phone Committee
- "Al Vallin Award" for Estimator of the Year – **Frank Young FCPE** and **Michael Moyers CPE**

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Lastly, we introduced and Installed your 2015-2016 Officers and Board Members. We were honored to have our Southwest Regional Governor, TJ Schwertfeger, preside over the installation of new Officers and Board of Directors. Your new Board is as follows: President – Michael Moyers CPE; 1st Vice President – John Balistreri CPE; 2nd Vice President – Dan Luckhardt CPE; Treasurer – Laura Parker CPE; Secretary – James Yu; Directors – John Wayne Heusner CPE, Steve Schraibman CPE, Fred Nagel CPE and David Luhm; Alternate Director – Paul Chang. Congratulations to all!

Membership Status:

As of the most recent Chapter Roster issued August 2015 by SBO (Society Business Office), we have a total of 65 members. Currently we have 27 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. Remember, to log in, 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.

Dues Renewal:

The official due date for your 2015-2016 Membership Dues is now past. But fear not, you can still renew your valuable membership. As of August 5th, we have had 47 members renew their memberships, 5 members have informed us that they will not be renewing, and 13 members have not renewed or expressed their intent to renew. Should you have questions regarding your membership or renewals, please feel free to give me a call at (858) 737-7316 or SBO at (615) 316-9200. I would like to ask all of you who have not done so already to please take a moment and renew your membership in a timely manner.

Upcoming Events:

Unfortunately, due to circumstances beyond our control, we had to cancel our August meeting.

Our Annual Planning Retreat had to be postponed. We will be rescheduling this important meeting shortly. This meeting is to be attended by all of the new 2015/2016 Officers and Board members as well as the outgoing Board. Details will be sent out shortly. It is very important that all incoming Officers and Directors attend this meeting.

Another event to keep an eye out for is the Fall SWNW Regional Meeting which will be held October 2-3, 2015 in Seattle, Washington.

Lastly, for those of you who have thought of becoming more involved in our Chapter, we would love to hear from you. If you are interested in helping and/or serving on a committee, please contact me at (858) 737-7316 or email me at michael.moyers@bestinteriors.net.

Michael D. Moyers, CPE

Best Interiors, Inc.

President, ASPE San Diego Chapter #4



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Photos from the ASPE San Diego Chapter #4 Awards Dinner Meeting—July 21, 2015



Frank Young, Programs Chair, with Keynote Speaker Walt Fegley, President of Reno Contracting, AGC SD President



Linda Young of CSOS and NAWIC Camp with Dr. Thais Alves of San Diego State University



Keynote Speaker Walt Fegley addressing the attendees



After they gave their testimonies, Scholarship Chair Dan Luckhardt (left) awarded scholarship checks to Alexa Rizaq and Elijah Elliott, here with President Mike Moyers (David Calderon was unable to attend)



Michael Moyers (center) presented with the President's Plaque by Chapter Awards Chair Hennie Degenaar (left) and Frank Young (right)

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



Dan Luckhardt (left) receives the Larry Kian Award for Outstanding Service as Scholarship Chair from Chapter Awards Chair Hennie Degenaar



Meredith Stumpo accepts the Member-Firm of the Year award on behalf of Turner Construction Co. from Past President Frank Young



David Luhm (left) receives the Jess Sisk Award for Outstanding Committee Chair as Golf Committee Chair from President Michael Moyers



James Yu (left) receives Officer of the Year Award as Secretary from Awards Chair Hennie Degenaar

(photos cont'd on pg 5)



T.J. Schwertfeger, West Region Governor, presents Al Vallin Estimator of the Year Awards to Mike Moyers and Frank Young



Certificates of Appreciation presented to outgoing Officers and Directors



West Region Governor T.J. Schwertfeger installs incoming Officers and Directors

ASK A CPE
by **Frank E. Young, FCPE**
ASPE Past National President, Past San Diego Chapter #4 President

“New Technologies for Construction Burst Forth onto the Education Scene”

During the recent Annual Meeting and Estimating Summit in San Diego, the Society unveiled three yearly awards to recognize outstanding contributions by individuals involved in furthering the values and benefits of Certification, Education, and Standards.

I was truly humbled and honored that ASPE chose to initiate the tribute for “Excellence in Education” by naming me as its first recipient. As many people may know, my career in construction has embraced education as a means to give back to our industry. The early involvement with UCSD Extension’s Certificate in A/E Practices as both an instructor and member of their leadership group has led to similar current advisory roles at NewSchool of Architecture + Design’s Construction Management program and Kearny High School’s Stanley Foster School of Engineering & Innovative Design as well as acting as an ACE mentor at Hoover High School. I have enjoyed the rewarding experiences while teaching classes to students and presenting seminars to professionals seeking to advance their careers. Opportunities to work on the creation of the Joint Cost Management Societies’ symposiums for three years, and on the pursuit of improved quality offerings by our own Estimating Academies both represented labors of love.




Frank Young, FCPE

The Council of Fellows will be more visible in the coming months. Lew Finkel FCPE and Chair of the Council will be informing members about several new initiatives to be undertaken by the group and specifically the Fellows Directors. We have begun work on revising our Charter and formulating policies and procedures to provide operational guidelines in the future. Bob Pratt FCPE will be coordinating a National Speakers’ Bureau to assist other construction-related organizations in their requests to provide knowledgeable representatives from ASPE to talk about our Mission, our programs, and how we benefit estimating professionals in the practice of construction estimating. Each Director will be tasked with writing an article for *Estimating Today* and individually ask other members within the Council to author similar treatises to share with those receiving that publication. We have been approached by Dan Wallace, Southwest Region Member-At-Large, to help the Department of Energy in rewriting their Estimating Guidelines. Fellows Lew Finkel, Earl Rosenow, and Frank Young will head the task force in that endeavor.

Now to the subject matter at hand described in the title for this article. Many institutions of higher education across the country will claim that their football teams annually clash with hated rivals in their conference or in that particular area of the country for supremacy in the sport. My alma mater in the Bay Area traditionally wages war with the University of California Berkeley Golden Bears at “The Big Game” to determine who will possess “The Axe” for yet another season. Some fans relish viewing replays of one of the great moments in all of sports when the Stanford Band prematurely ran onto the playing field before the final gun. That act of sheer lunacy allowed the Cal Bear return man to score the go-ahead touchdown by dashing and darting between athletes and musicians on his way to the goal line. What would motivate a seemingly intelligent group of students to choose to inappropriately display their enthusiasm and excitement at the expense of winning the game?

Given the above background surrounding both Universities, it was most interesting to learn about a cooperative enterprise involving both schools, almost 20 years ago when Design/Build was in its infancy and before most construction professionals knew about Integrated Project Delivery as an alternative delivery



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system. An “experimental” civil engineering class taught at Stanford University used the latest computer and telecommunications technology at the time to adapt the old “Master Builder” approach to designing and constructing modern buildings. For centuries, a single individual called a “Master Builder” was responsible for all aspects of a building’s design and construction. In the mid-19th century, as construction became more complex, the “Master Builder” was gradually replaced by three people – the architect who designs the building, the engineer who figures out how to safely build the edifice, and the constructor who oversees the construction. In the past decades, this traditional design and construction process has broken down, leading to costly redesigns, project delays, increased budgets, and even the threat of litigation following unresolved disputes.

The volume of knowledge and expertise involved in today’s projects became too much for any one individual to handle, but approaching the process in a collaborative manner by working together as an interactive team had merit. For this exercise, the problem was for the students to design and build an engineering building complete with classrooms, laboratories, auditorium and offices. Even though the five teams had the same assignment, each group was given a different location for the structure – on a river near Sacramento, CA, on the Boston shoreline, on the Oregon coast, on an island off of Florida, and on a mountain ridge near Lake Tahoe, CA (quite a diverse range of sites). The latter team consisted of a graduate student in Structures who handled the design, a graduate student in Construction Management who planned the construction and estimated its cost, and an undergraduate student in Civil Engineering who did a special study of the life-cycle costs of a special spectral glass. The “mountain ridge” team used advanced CAD tools in the design and in the planning process, virtual reality software (BIM) to walk through the building to gain a sense of what the final product would look like, priced the labor, material, and equipment associated with construction from sources on the Internet, and employed advanced project management software in preparing a detailed schedule. Alumni from both schools added realism to the exercise by playing the role of project owners. Changes in the overall footprint of the building or other design features that would impact the cost had to be negotiated with those owners. Industry representatives who attended the class presentations were impressed by the practical nature of the course.

The work was facilitated by a Project-Based Learning Laboratory on the Stanford campus which has been tailored to allow architects, engineers and contractors to interact productively. It was funded by both government and business entities. The floor of the lab is set up to provide a grid of power and network connections enabling workstations to be set up in any location. The specialized furniture can be combined into different layouts from hexagons for group discussions to “Y” configurations for each team to have individual desk space plus a common space for conversation and exchange of information. Web-based tools permit geographically remote team members to participate by videoconferencing and by sharing documents and drawings.

The principal instructor, Renate Fruchter, has designed some software called Interdisciplinary Communication Medium (ICM) to enable interaction between students from different disciplines through a basic shared CAD program. In addition, the lab workstations have been equipped with several commercial software packages to encourage communication. Even with the ability to participate by phone, fax or email, most students chose to attend the sessions live. As the program grows, faculty members look forward to making improvements through new software and tweaking the various processes.

I would personally encourage all Chapters to seek out local educational institutions to offer their assistance by mentoring, teaching classes, or generally promoting career development for those students. These young men and women represent the future professionals that will become the next generation of estimators and project managers in the construction industry. If your Chapter has not become involved with the high schools, junior colleges, or colleges and universities in the immediate area, San Diego Chapter #4 will volunteer its support to begin some type of collaborative program with these groups. Since our inception in 1970, we have been fully engaged with the education community by providing instructors and serving on advisory boards to urge today’s students to prepare themselves for the high standards demanded in the workplace. ■

9th Annual Golf Tournament Recap

by David Luhm, E

Director/Golf Committee Chair, ASPE San Diego Chapter #4



David Luhm, E

Wow!! What a fantastic event the 9th annual 2015 ASPE Golf Tournament was. The event, which was held on the 31st of August at the Riverwalk Golf Club in Mission Valley, is most importantly a very popular fundraiser to benefit the ASPE Chapter #4 Scholarship Program. The 78 players and other participants enjoyed great refreshments, fantastic breakfast burritos, a putting contest, a corn-hole competition with a free-flowing beer keg, beautiful weather, and a fun-filled day of some challenging golf.

The top honors for the day went to **team Helix Electric** with the low score of the day, followed by **team Alpha Mechanical**, with **team Frank Young** a very close third position. At the luncheon that followed the day of golf, participants feasted on a great lunch buffet, took their chance at winning some fun and useful raffle prizes as well as the three grand prize drawings. The grand prize winners were as follows: Round of golf for 4 at

Riverwalk (**Jim Lewis**), gas-fired portable tailgate grill (**Tony Paluso**), and the awesome Diamondback mountain bike (**Paul Chang**). Honors for the corn-hole competition went out to **Shane Islander** who, by doing so, won the actual game to take home with him.

As the Golf Tournament Chair I would personally like to thank all of the committee members and associated volunteers for all of their time, hard work and help on this event: **Christiana Gerber-Honnet, Paul Chang, Fred Nagel, Michael Moyers, Frank Young** and **Francisco Arceo**. A special thanks to **Amanda and Madison Waller** for help at the registration table, corn-hole event, and raffle distribution as well as the **entire staff at the Riverwalk Golf Club**.

As a member and Director, I believe I can speak for the entire Chapter when I say that we would sincerely like to thank all of the players, participants and sponsors for the generosity for this event, we look forward to an even better one next year. Hope to see you all there. ■

Meet the Members of Your Chapter Board ...

Focus on **MICHAEL D. MOYERS, CPE**

Senior Estimator/Preconstruction Specialist – Best Interiors, Inc.

Michael D. Moyers, CPE was born and raised in San Diego. In his early years, he was highly involved with the Boy Scouts of America and obtained the rank of Eagle Scout.

Mike graduated from Granite Hills High School in 1974. He continued his education at Grossmont College, obtaining an AS in Architecture and completing his BBA at National University. He also attended San Diego State, obtaining a Certificate in Construction Practices.

Mike started his career in 1977 as a Civil Designer with San Diego Gas & Electric and eventually moved into estimating within the Cost Engineering Department. He has since worked for Ahlstrom Pyropower as a Senior Cost Estimator/Buyer, Expansion Joint Systems as a Senior Cost Estimator, and Valley Metals as an Estimator. He started in the subcontracting arena in 1998 with Martin & Lewis Drywall as a Project Estimator. In 2001, he made a move to Best Interiors, Inc. where he currently holds the position of Senior Estimator/Preconstruction Specialist for the San Diego office.

Away from estimating, Mike enjoys spending time with his wife, kids and two grandsons. His hobbies include woodworking, boating, fishing, gardening and music.

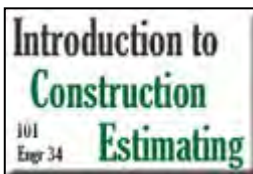
Mike originally joined ASPE Chapter #4 in 1984, obtained his CPE in 1987, and reinstated his membership in 2008. He is currently serving the Chapter as President and Membership Chairman. ■

Online Construction Classes for Fall Semester 2015

The following article contains information about online construction courses offered at San Diego State University and selected non-profit construction industry organizations. **Classes start September 7, 2015.** Registrations are currently being accepted by all providers.

Registration options for Fall Semester 2015 classes include:

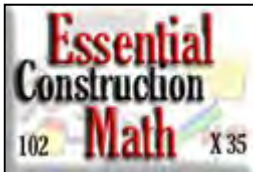
- | | | | |
|-------|--|--------|---|
| * 101 | Introduction to Construction Estimating | * 201S | Leadership and Motivation (STP Unit 1) |
| * 102 | Essential Construction Math | * 203P | Problem Solving and Decision Making for Construction Supervisors (STP Unit 3) |
| * 103 | Construction Blueprint Reading | * 206T | Cost Awareness and Production Control (STP Unit 6) |
| * 105 | Estimating and Bidding 1 | * 308 | Construction Project Management NEW |
| * 106 | Estimating and Bidding 2 | | |
| * 107 | Construction Materials and Processes | | |
| * 109 | Practical Applications of Civil Construction | | |
| * 110 | Civil Blueprint Reading and Materials NEW | | |



101 INTRODUCTION TO CONSTRUCTION ESTIMATING (online)

Learn the basic principles of construction estimating. Topics to be studied include: organization of the estimate, types of estimates, elements of an estimate, quantity take-off techniques, pricing techniques, adjusting the estimate for a variety of variable factors, estimating labor, materials and equipment, and profit and overhead markups. Students will learn about the different types of estimates and how to organize an estimating

document. This course will build a foundation of knowledge that the student will use while estimating virtually any individual trade or project type. http://www.constructionclasses.com/estcert/101_itce.htm



102 ESSENTIAL CONSTRUCTION MATH (online)

This class is intended to develop mathematical skills that can be applied to the construction trades through practice and application. This course is an introduction to other courses in construction. While this class is not a prerequisite for any other classes, it does provide a foundation for them. http://www.constructionclasses.com/estcert/102_math.htm



103 CONSTRUCTION BLUEPRINT READING (online)

Learn how to read architectural, structural, civil, mechanical and electrical blueprints. Students will practice looking up information and solving common construction problems by reading the blueprints. This course is designed to provide foundational knowledge and practice at reading blueprints. http://www.constructionclasses.com/blueprint/blueprint_syllabus.htm



105 ESTIMATING AND BIDDING 1 (online)

This course features hands-on estimating and quantity take-off activities associated with General Conditions, Earthwork, Site Work, Concrete and Masonry. By the end of this class, students should be able to estimate the cost of general conditions, prepare quantity take-off of excavation and backfill, prepare a quantity take-off of concrete and formwork, and use unit prices to price an estimate. <http://www.constructionclasses.com/estcert/eb1.htm>



106 ESTIMATING AND BIDDING 2 (online)

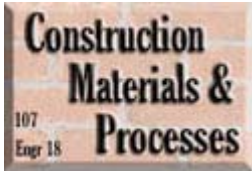
This course features hands-on estimating and quantity take-off activities associated with Metals, Wood, Doors and Windows, Finishes, Electrical, and Mechanical Estimating. By the end of this class students should be able to estimate the conceptual cost of structural metals, prepare quantity take-off and estimate of rough carpentry, prepare a quantity take-off of roofing and waterproofing, use unit prices to price doors and windows, prepare quantity take-off and estimate various finishes, prepare a quantity take-off and conceptual estimate of mechanical systems, and prepare a quantity take-off and conceptual estimate of electrical systems.

<http://www.constructionclasses.com/estcert/eb2.htm>

(cont'd on pg 10)

Online Construction Classes for Fall Semester 2015

[\(cont'd from pg 9\)](#)



107 CONSTRUCTION MATERIALS AND PROCESSES (online)

Learn about quality control procedures for various materials, material manufacturing processes and the physical limitations of the materials being studied. The regulatory environment under which materials are manufactured and incorporated into new structures will be studied.

http://www.constructionclasses.com/estcert/107_mats.htm

Civil Site Work Classes

109 PRACTICAL APPLICATIONS OF CIVIL CONSTRUCTION (online)

Learn civil construction techniques including site preparation and grading, excavation, backfill, compaction, trenching, paving and dewatering. <http://www.constructionclasses.com/csups/descriptions/109.htm>

110 CIVIL BLUEPRINT READING AND MATERIALS (online) **NEW**

This course gives students an overall and elementary understanding of civil construction blueprints and materials. This includes reading specifications, manufacture and use of civil construction materials, and more.

<http://constructionclasses.com/css/descriptions/110.htm>

Construction Supervision Classes

201S LEADERSHIP AND MOTIVATION (online)

Learn how to recognize your style of leadership and how to utilize other styles when appropriate. The affect that attitudes and abilities have on job performance and how to positively influence attitudes and abilities will be studied. The leader as goal setter, communicator and role model will all be discussed. Job site applications of all subjects will be stressed. <http://www.constructionclasses.com/css/descriptions/201S.htm>

203P PROBLEM SOLVING AND DECISION MAKING FOR CONSTRUCTION SUPERVISORS (online)

Learn how to identify, prevent, and solve construction problems. Subjects include identifying the source of problems, barriers to problem solving and symptoms that often mask the real problem. Human performance problems, scheduling problems and technical problems will be covered. The six-step method of problem solving and decision making will be stressed. <http://www.constructionclasses.com/css/descriptions/203P.htm>

206T COST AWARENESS AND PRODUCTION CONTROL (online)

Learn the skills necessary for effective control of construction costs at the jobsite. Apply principles and practices associated with cost awareness and production control to each element of your project. Control of labor and equipment costs. <http://www.constructionclasses.com/css/descriptions/206T.htm>

Project Management Class

308 CONSTRUCTION PROJECT MANAGEMENT **NEW**

This course will provide construction professionals with a framework that will help them to understand the project manager's roles, responsibilities, processes and procedures. <http://www.constructionclasses.com/pm/308.htm>

To learn more about online CERTIFICATE PROGRAMS, go to:

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QUESTIONS? Send an email to Lisa Thibodeaux at Lisa@ConstructionClasses.com or visit the Frequently Asked Questions page at http://www.constructionclasses.com/faq_potential.htm. ■



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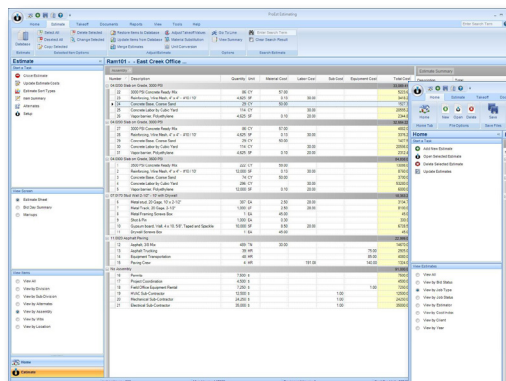
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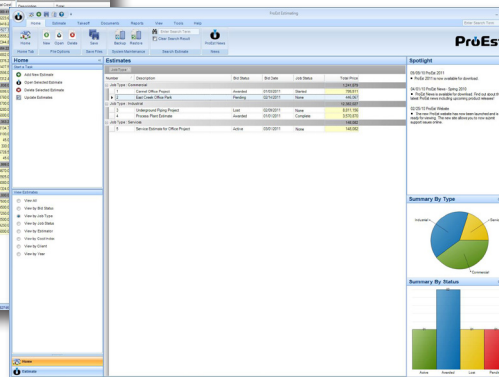
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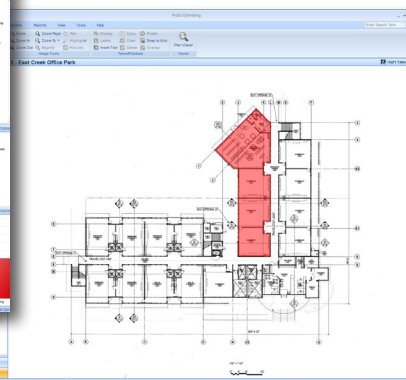
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 OR lauraparkercpe@gmail.com



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 858.737.7316



ASPE San Diego Chapter #4 CALENDAR OF EVENTS

- ◆ **Saturday, August ? 2015 — 8:00 AM to 12:00 PM**
ASPE San Diego Annual Planning Retreat
Location: Cumming Corporation
15015 Avenue of Science, Suite 160
San Diego, CA 92128
- ◆ **Friday, October 2, 2015 — 8:00 AM to 5:00 PM**
Saturday, October 3, 2015 — 8:00 AM to 12:00 PM
ASPE Joint Northwest/Southwest Regional Meeting
Tentative Ramada Inn
Location: SeaTac Airport—Seattle, WA
- ◆ **Tuesday, August 18, 2015 — 5:00 PM Registration**
ASPE San Diego Monthly Dinner Meeting
Program: Emerging Technologies for Professional Estimators **MEETING CANCELED**
Dinner Sheraton La Jolla Hotel
Venue: 3299 Holiday Court, La Jolla
- ◆ **Tuesday, October 20, 2015 — 5:00 PM Registration**
ASPE San Diego Monthly Dinner Meeting
Program: Presentation on September Site Tour
Dinner To be determined
Venue:
Location: To be determined
- ◆ **Tuesday, September 1, 2015 — 5:30 to 7:30 PM**
ASPE San Diego Board of Directors' Meeting
Location: To be determined
- ◆ **Tuesday, October 27, 2015 — 5:30 to 7:30 PM**
ASPE San Diego Board of Directors' Meeting
Location: Cumming Corporation
15015 Avenue of Science, Suite 160
San Diego, CA 92128
- ◆ **Tuesday, September 15, 2015 — 5:00 PM Registration**
ASPE San Diego Monthly Dinner Meeting
Program: Site Tour (to be determined)
Dinner Catered at Jobsite
Venue:
Location: To be determined
- ◆ **Tuesday, November 17, 2015 — 5:00 PM Registration**
ASPE San Diego Monthly Dinner Meeting
Program: Target Value Design and Integrated Project Delivery: What Do These Innovations Mean for Estimators
Principal Speaker: David Umstot
Location: To be determined
- ◆ **Tuesday, September 22, 2015 — 5:30 to 7:30 PM**
ASPE San Diego Board of Directors' Meeting
Location: Cumming Corporation
15015 Avenue of Science, Suite 160
San Diego, CA 92128
- ◆ **Tuesday, December 1, 2015 — 5:30 to 7:30 PM**
ASPE San Diego Board of Directors' Meeting
Location: Cumming Corporation
15015 Avenue of Science, Suite 160
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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