



Published by San Diego Chapter #4  
American Society of Professional Estimators



# S.D. Mator



December 2015

Volume 14, Issue 5

## 2016 – A Year of Yawn

**DATE:** FRIDAY, DECEMBER 18, 2015

**TIME:** **7:00 AM**—Registration  
**7:30 AM**—Breakfast Buffet  
**7:45 AM**—Announcements  
approx. **8:00 AM**—Speaker's  
PowerPoint  
Presentation

**PROGRAM:**

**2016 – A YEAR OF YAWN**

**PRINCIPAL SPEAKER:**

**Alan Nevin**  
*Director of Economic & Market Research  
Xpera Group*

**MEETING VENUE:**

**Admiral Baker Golf Course Clubhouse**  
(Presidio Ballroom)  
2400 Admiral Baker Road, San Diego  
Off of Friars Road, east of I-15

**COST: \$25 per person**

**Special rate for full-time  
students at \$20 per student**

*Cancellations must be received by NOON on Wed.  
December 16<sup>th</sup> or no shows will be billed accordingly.*

[Click here for Meeting Reservation Policy](#)

**RSVP:** Paul Chang  
Sundt Construction  
619.321.4822  
[aspechapter4@outlook.com](mailto:aspechapter4@outlook.com)

Meeting at a Glance



## December Program Notes:

### 2016 – A Year of Yawn



Alan Nevin

**A**s another year draws to a close, it signifies the return of our friendly guru who annually endeavors to chart the unknown waters pertaining to future local real estate and construction markets. Alan Nevin cannot be described as the “Grinch Who Stole Christmas” in bringing several lumps of coal to the joint ASPE/CSI gathering; nor can he be characterized as “good ol’ St. Nick” who delivers presents in abundance to the construction industry. Regardless of the outlook for 2016, we will be once again entertained with his wit and his knowledge on Friday, December 18, 2015. No one is certain as to the tools and resources brought to bear in preparing his message, but this prognosticator’s track record over past decades has been on target more often than not.

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**G**reetings to all! I hope you all had a Happy and Blessed Thanksgiving with Family and Friends. During this Holiday Season. I would like to wish all of you and your families a very Merry Christmas and a safe and Happy New Year.

As we wind down 2015 and slip into 2016, it's hard to believe another year has come and gone so quickly. We have had what I see as a difficult year in terms of attendance and participation. We had two meetings cancelled due to the lack of RSVPs and low attendance at most of the others. I look forward to next year as a year we can turn things around. We have discussed this problem at our Board Meetings and are going to try a few new things next year to "Change Things Up." If anyone has any suggestions, please contact any of the Board Members and let us know your ideas. We would love to hear from you!



*Michael Moyers, CPE*

At our November meeting, we had Dave Umstot with Umstot Project & Facilities Solutions with us. He gave a lengthy and interesting talk on "Lean Construction and Its Impact on Estimating and Operations in Construction Firms." Though we did not have a big group, the ones who attended enjoyed the presentation. We also congratulated and presented Certificates to our newest CPEs. Congratulations to **Jenna Swiecki CPE, Wrey Farrales CPE, Alton Sabat CPE** and **Christopher Wilson CPE**. Job well done!



(L-to-R) Wrey Farrales CPE, Christopher Wilson CPE, Jenna Swiecki CPE, and John Balistreri CPE

**Membership Status:** As of the most recent Chapter Roster issued December 2015 by SBO (Society Business Office), our membership stands at 56. Currently, we have 24 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 [frednagel@gmail.com](mailto:frednagel@gmail.com).

For those of you who have thought of becoming more involved in our Chapter, we could always use the help. 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).

**New Members:** We would like to welcome back **Steve Fisher** to the Chapter.

**Upcoming Events:** Please come and join us at our December Breakfast Meeting. We will be meeting on Friday, December 18, 2015 at the Admiral Baker Golf Course Clubhouse (Presidio Ballroom). We will again have **Alan Nevin with the Xpera Group**. I hope to see you all there. Please read the rest of this issue for additional upcoming events and meetings!

**Michael D. Moyers, CPE**

Best Interiors, Inc.

*ASPE San Diego Chapter #4 President*

The title for this year's presentation sounds like people may fall asleep listening to the message. However, it is worthwhile to glean what other economists throughout the country have to offer about what the future holds in store for our industry. Following the Dodge Data & Analytics' Construction Outlook Executive Conference October 29-30 in Washington, DC, the Chief Economists for three construction trade associations were interviewed by Emily Peiffer from the *Construction DIVE* newsletter.

Anirban Basu with Associated Builders & Contractors (ABC) predicted 7.4% growth in the non-residential sector for 2016, but emphasized the fact that contractors would have difficulty in meeting the demand due to the continued lack of available workers. The Federal Reserve's ongoing deliberations about raising interest rates could impact the prospects for any expansion. The current four economic drivers, consumer spending, auto production, residential and non-residential construction, are tied directly to low interest rates, and any upward spiral will create problems for the U.S. economy. The Architectural Billings Index is becoming more robust, which generally bodes well for contractors downstream.

Kermit Baker with the American Institute of Architects expects significant growth for the single-family residential market, as multi-family and home improvement segments have almost fully recovered after the downturn and now seem to be entering an expansion phase. He anticipates double-digit increases in spending for office and retail projects. Baker worries about the labor shortages with the decline in immigrant workers and the lack of young people enrolled in technical training courses who formally were an excellent source of skilled people for the construction workforce.

The National Association of Home Builders' David Crowe also expressed optimism for the residential portion based upon comparing numbers for employment gains vs. building permits for single-family housing. Available, buildable lots remain an obstacle to progress, and labor shortages continue due to less competitive wages for residential tradespeople (14% more than the average wage in 1990 vs. 4% today). He forecasts a 6% increase in multi-family unit starts for 2016, down 3% from the expected total for 2015.

Dodge Data & Analytics predicts an 11% increase in office, shopping center, warehouse and hotel construction next year, ramping up from the 4% gain estimated for 2015. Their numbers for multi-family units (7%) are slightly better than the NAHB figures. In general, the forecasts, while less dynamic than 2015, signify a positive outlook for our industry. However, job growth has begun to soften in the past three months. While job growth has been viewed as a lagging indicator, the experts think that something else has happened to our economy to cause this decline. Weakness in the emerging nations and overall sluggishness in the developed world countries put pressure on their economies (only India shows prospects for a solid year), while the U.S. dollar remains much stronger over the past year. However, the latter phenomenon has brought about a reverse effect on U.S. exports, which should decline in 2015.

The majority of financial experts seems to agree that business conditions will remain the same in 2016, hiring and spending on plant and equipment will not increase appreciably, and the overall economy will stay at current levels. These prognostications certainly seem to parallel the thinking of our principal speaker, based upon the title of his presentation "A Year of Yawn." Whatever happens over the next 12 months will undoubtedly generate sufficient material for another visit to review, ponder, and proclaim what lies ahead for real estate and construction.

Start the holiday season by joining ASPE and CSI on Friday morning, December 18<sup>th</sup>, to check the report card for the 2015 local real estate and construction economies and learn what's in store for 2016 from a notable authority in his field. Alan Nevin, Director of Economic and Market Research at Xpera Group, will peer into his crystal ball while covering the following topics:

- Discussion about the Lackluster Economy with Particular Emphasis on Real Estate
- Why the Building Industry Has Failed to Recover Even Though the Recession Has Been Over for 5 Years
- Painting a Picture of the World and U.S. Economies over the Next 25 Years
- Introduction of Chapters 1 and 2 of his New Book Entitled "The Great Divide"

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

Venue: Admiral Baker Golf Course Clubhouse (Presidio Ballroom)

Directions: 2400 Admiral Baker Road, San Diego (take Friars Road east from I-15, turn left at the traffic light onto Santo Road, and then turn right onto Admiral Baker Road)

Schedule: Registration – 7:00 A.M.

Breakfast Buffet – service starts at 7:30 A.M.

*Chilled Juices, Scrambled Eggs, Bacon & Sausage, Home Fried Potatoes, Biscuits/Pastries/ Muffins, Coffee or Tea*

Announcements – 7:45 A.M.

Speaker's PowerPoint Presentation – to follow

Cost: \$25.00 per person; special rate for full-time students at \$20.00 per student

The event represents one of the most anticipated programs during the year. Invite a colleague or guest to attend this informative meeting.

Contact Paul Chang with Sundt Construction to make your reservation today:

Telephone – (619) 321-4800    Email – [aspechapter4@outlook.com](mailto:aspechapter4@outlook.com)

## **Frank E. Young, FCPE**

*ASPE San Diego Chapter #4  
Programs Committee Chair*

## **Announcing the Passing of Andrew Zielinski**

**I**t is with sincere regret that we must inform members of San Diego Chapter #4 and others in the construction community of the death of Andy Zielinski, former ASPE member, on November 2, 2015.

Andy was born in Bay City, Michigan in 1939, joined the U.S. Navy in 1957, and served aboard the Frank Knox, a Gearing class destroyer named in honor of a former Secretary of the Navy. He worked as an estimator for several mechanical contractors in our area, including Jackson & Blanc, Strang Heating & Air Conditioning, Comfort Systems USA, and had his own consulting business. After retiring from the industry, he pursued other interests in real estate and continued to enjoy the outdoors (sailing, hiking, and camping). Andy is survived by one brother and a sister, two daughters, six grandchildren and four nieces.

I personally enjoyed working with him on a number of major mechanical contracts where Jackson & Blanc acted as the prime, and Champion Const. Co. handled the necessary civil, structural, and architectural trades. The three projects that immediately come to mind include the HVAC & Electrical upgrades for the County Administration Center in downtown San Diego, renovations to Building 379 and constructing three paint booths within steel and sheet metal structures at NAS North Island, and concrete foundations for General Atomics in Sorrento Valley. Andy and I invested in several condo units and remained close friends while he was still estimating mechanical work. We will all miss his insight and his humor.

*Frank E. Young FCPE  
ASPE San Diego Chapter #4 Past President*

### ASPE Certification



*John Balistreri, CPE*

The ASPE offers 2 options for Certification. There is the **newest certification of Associate Estimator Professional (AEP)**. This certification is to attract recent graduates with either a four-year degree or a post-graduate degree earned in construction management who are entering the field of estimating. This exam is designed for candidates who have not reached the five years of work experience in estimating that is required for the CPE Credential. The Associate Estimator Professional (AEP) exam is the equivalent of the General Estimating Knowledge exam (GEK) which is one of two tests required for a CPE.

The ASPE also has the **Certified Professional Estimator**. The **CPE** is one of the most respected credentials in the estimating profession.

#### Requirements for becoming a Certified Professional Estimator are:

- A minimum of 5 years' estimating experience.
- Completion of the ASPE workshop on Certification guidelines/requirements.
- Demonstrated technical writing abilities. A technical paper of 2,500 words titled "How to Estimate the Cost of..." of which you submit 3 topics. The Certification Board reviews and approves one of the 3 topics.
- Demonstrated communication skills. Your Technical Paper will be graded by 3 current CPE's based upon a syllabus.
- A General Estimating Knowledge exam. This is a timed test of approximately 450 questions and you have 4 hours to complete it.
- A Discipline Specific test. This is also a timed test which you have 8 hours to complete.

After you become a CPE, you may think, "I have completed that task and I'm done." That's not true. **As a CPE, you have to continue your education to maintain your CPE status.** Your Certification is up for renewal after 3 years. The ASPE is moving from a point system to a Professional Development Unit (PDU) system.

There are very few of us left on the point system and after next year we will all be on the PDU system. We will be required to present 90 PDU's for the 3-year period.

You may ask "**Why get a CPE?**" Voluntary certification can be beneficial to Cost Estimators because it provides professional recognition of the estimator's competence and experience. As Tom Norton stated in *Estimating Today*, It tells your supervisor or competitors, "Here is an individual who cares about the work he or she does, who is interested in continually learning about his or her field to stay on top of the latest technology. One who is ethical, who has a network of fellow estimators to call upon if needed, and has been accredited by a national accreditation board and by the ASPE as having a certain level of knowledge within a given field."

This year in 2015, we had 10 members who have started the program and 4 who have successfully completed the requirements and become Chapter #4's newest Certified Professional Estimators. We would like to take the time now to recognize and celebrate their achievement. On behalf of Chapter #4, I want to congratulate **the newest CPE's**:

**Wrey Farrales, CPE - Cumming Corporation**  
**Alton P. Sabaot, CPE - Cumming Corporation**  
**Jenna Swiecki, CPE - Cumming Corporation**  
**Christopher A. Wilson, CPE - Cumming Corporation**

**Meet a Returning Member of Your Chapter ...  
Focus on STEPHEN FISHER, CPE – Estimator  
Kaiser Permanente NFC Service Delivery Team**



*Stephen L. Fisher, CPE*

**S**tephen Fisher, CPE is one of the estimators at Kaiser Permanente NFC Service Delivery Team and also the President of Fisher Consulting Group, providing construction litigation service to Southern California Contractors.

Steve was born and raised in San Diego, graduating from Point Loma High School. He entered the construction industry at the age of 23 while living on the island of Kauai in the Hawaiian Islands.

Working for several General Contractors designing and building custom homes, Steve eventually joined the carpenters union, constructing many of the hotels and condominium complexes located in the Poipu Beach area. In 1984, Steve took the Project Engineer position at Poipu Kai Resort, responsible for the supervision of on- and off-site reconstruction and repair and maintenance of four condominium complexes and two residential subdivisions.

Steve relocated to San Diego in 1986, working as a carpenter while attending Mesa College. In 1988, Steve enrolled in San Diego State University's extended studies focusing on Construction Management and Practices. He also joined R.E. Hazard Jr., Inc. as a Contract Manager / Estimator. His responsibilities included pre-construction, quantity survey and assistance in bidding of projects. During the construction phase, Steve's responsibilities included acting as the company liaison between the owner, design professionals, and subcontractors, handling submittals, monitoring construction costs, value engineering, cost analysis, and finally, project closeout.

In 1991, while living in San Clemente, Steve began working for a home remodeling company in Irvine, CA. As the Construction Manager, his responsibilities included acting as liaison between the owner, the design team, and subcontractors. He was also responsible for pre-construction constructability review, scheduling, subcontractor negotiations, site meetings, monitoring of construction, progress payment and, punch-list through project closeout.

A position opened up in the forensic estimating department at Melhorn Construction Company in 1993. Focusing on forensic estimating, Steve's responsibilities included project set-up, forensic investigation, document analysis, quantity survey and cost estimating, delay analysis, contract disputes, and materials research.

Steve joined McCormick Construction Company, San Diego Division, as a forensic estimator in 1995. His responsibilities included project set-up, forensic investigation, quantity survey and cost estimating, constructability review. In 1997, Steve was promoted to Manager of the Estimating Department, San Diego Division, which furthered his responsibilities to include material research, subcontractor allocations, document research and analysis, peer review, delay analysis, contract disputes, participation in expert meetings, mandatory settlement conferences (MSC), depositions and trial testimony.

In 2006, Steve joined the team at MC Consultants Inc. where his responsibilities included forensic investigation, document analysis, development of repair recommendations, quantity survey and cost estimating, delay analysis, contract disputes, mold investigation, building code and materials research.

Fisher Consulting Group opened its doors in the spring of 2009, offering forensic investigation and estimating services for construction defect litigation which eventually led to the Chief Estimator position at CORE Consulting Group. Responsibilities included forensic investigation, document analysis, development of repair recommendations, quantity survey and cost estimating, delay analysis, contract disputes, building code and materials research, mediation, depositions and trial testimony.

In the spring/summer of 2014, an opportunity opened up for Steve to become the Chief Estimator at Arita Poulson General Contracting in Hawaii with offices on Oahu and Maui.

Steve joined the estimating team at Kaiser Permanente working with John Balistreri, CPE in San Diego.

Interests ~ Time with family. They enjoy cycling along the beach, kayaking, surfing, swimming, and playing with their dogs. Steve also enjoys music, playing drums and live concerts. They enjoy family vacations to the Grand Tetons (great kayaking, hiking and cycling), Yellowstone and the Hawaiian Islands.

On behalf of Chapter #4, we welcome Steve back as a returning member. ■



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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 Fred Nagel CPE at:

[frednagel@gmail.com](mailto:frednagel@gmail.com) 619.647.1304

# ASPE San Diego Chapter #4

## CALENDAR OF EVENTS



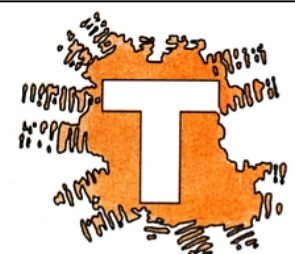
- ◆ **Tuesday, December 1, 2015 (5:30-7:30 PM)**  
**ASPE San Diego Board of Directors' Meeting**  
**Location:** Kaiser Permanente Facilities Office  
 8010 Parkway Drive, La Mesa
  
- ◆ **Friday, December 18, 2015 (7:00 AM Registration)**  
**Joint ASPE/CSI San Diego Christmas Breakfast Meeting**  
**Breakfast Service: BEGINS PROMPTLY AT 7:30 AM**  
**Program:** 2016 – A Year of Yawn (Economic Forecast for Real Estate and Construction)  
**Speaker:** Alan Nevin  
 Director of Economic & Market Research  
 Xpera Group  
**Location:** Admiral Baker Golf Course Clubhouse  
 2400 Admiral Baker Road, San Diego
  
- ◆ **Tuesday, December 29, 2015**  
**NO ASPE San Diego Board of Directors' Meeting**
  
- ◆ **Tuesday, January 19, 2016 (5:30-7:00 PM)**  
**ASPE San Diego Monthly Dinner Meeting**  
**Social Get-Together: "New Year Social Mixer"**  
**Location:** Ballast Point Brewery  
 9045 Carroll Way, San Diego  
 (North off of Miramar Road)
  
- ◆ **Tuesday, January 24, 2016 (5:30-7:30 PM)**  
**ASPE San Diego Board of Directors' Meeting**  
**Location:** To Be Determined
  
- ◆ **Tuesday, February 16, 2016 (5:00 PM Registration)**  
**ASPE San Diego Monthly Dinner Meeting**  
**Tentative Program:** Future Building Projects on UCSD Campus  
**Tentative Speakers:** Robin Tsuchida and Mark Rowland  
 UCSD Facilities Design & Construction  
**Location:** Riverwalk Golf Club  
 1150 Fashion Valley Road, San Diego
  
- ◆ **Tuesday, February 23, 2016 (5:30-7:30 PM)**  
**ASPE San Diego Board of Directors' Meeting**  
**Location:** To Be Determined
  
- ◆ **Tuesday, March 15, 2016 (5:00 PM Registration)**  
**ASPE San Diego Monthly Dinner Meeting**  
**Tentative Program:** Ethics Program  
 (Principal Speaker to be determined)  
**Tentative In-House Speaker:** John Wayne Heusner  
 CRB Builders  
**Location:** Riverwalk Golf Club  
 1150 Fashion Valley Road, San Diego



**Todd Ebbert**  
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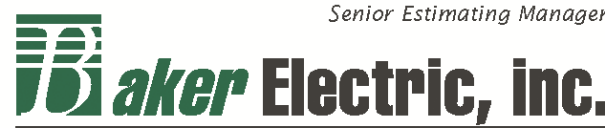
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# GET INVOLVED IN YOUR LOCAL CHAPTER !!!



## TECHNICAL COMMITTEES:

### Certification:

John Balistreri, CPE

### Education:

Frank Young, FCPE  
John Heusner, CPE

### Standards:

Fred Nagel, CPE

## STANDING COMMITTEES:

### Chapter Awards

### National Awards

### Nominations:

Frank Young, FCPE

### Bylaws:

Michael Moyers, CPE

### Parliamentarian:

*PENDING*

### Communications—

### Newsletter & Website:

John Balistreri, CPE

### Finance:

Michael Moyers, CPE

### Ways & Means:

David Luhm, E

### Historical:

*PENDING*

### Public Relations:

Steve Schraibman, CPE

### Membership:

Fred Nagel, CPE

### Programs/Calendar:

Frank Young, FCPE

## OTHER COMMITTEES:

### Ethics:

*PENDING*

### Mentoring:

Frank Young, FCPE

### Scholarships:

Dan Luckhardt, CPE

### Telephone:

Paul Chang, E

## 2015-2016 Chapter Officers

| Office                               | Officer                                     | Phone  | Fax          | Email  |
|--------------------------------------|---|--|--------------|--|
| <b>President</b>                     | Michael Moyers, CPE<br>Best Interiors, Inc. | 858.737.7316<br>619.843.6962-C                 | 858.737.7317 | <a href="mailto:michael.moyers@bestinteriors.net">michael.moyers@bestinteriors.net</a>                                       |
| <b>1<sup>st</sup> Vice-President</b> | John Balistreri, CPE<br>Kaiser Permanente   | 619.589.3080<br>619.861.1131-C                 | 619.589.3192 | <a href="mailto:john.t.balistreri@kp.org">john.t.balistreri@kp.org</a>   |
| <b>2<sup>nd</sup> Vice-President</b> | Dan Luckhardt, CPE<br>BNBuilders, Inc.      | 858.366.0931<br>619.633.8925-C                 |              | <a href="mailto:daniel.luckhardt@bnbuilders.com">daniel.luckhardt@bnbuilders.com</a>   |
| <b>3<sup>rd</sup> Vice-President</b> | VACANT                                      |  |              |  |
| <b>Secretary</b>                     | James Yu, E<br>Cumming Corp. USA            | 858.217.3574<br>858.273.9491-C                 | 858.673.9263 | <a href="mailto:ju@ccorpusa.com">ju@ccorpusa.com</a>   |
| <b>Treasurer</b>                     | Laura Parker, CPE                           | 619.977.2817-C                                 |              | <a href="mailto:lauraparker@ccpe.com">lauraparker@ccpe.com</a>   |
| <b>Immediate Past President</b>      | Frank E. Young, FCPE<br>CSOS Consulting     | 619.440.5517<br>619.980.4025-C                 | 619.401.7545 | <a href="mailto:pancho77@cox.net">pancho77@cox.net</a>   |
| <b>Executive Administrator</b>       | Margy Ashby                                 | 619.749.1890<br>619.593.9988<br>619.302.3257-C | 619.839.3817 | <a href="mailto:info@aspechapter4.org">info@aspechapter4.org</a><br><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>   |

## 2015-2016 Chapter Board of Directors

| Director   | Phone                               | Fax          | Email  |
|--|-------------------------------------|--------------|--|
| John W. Heusner, CPE<br>CRB Builders               | 760.444.3319                        | 760.496.3711 | <a href="mailto:johnwheusner@san.rr.com">johnwheusner@san.rr.com</a>     |
| David Luhm, E<br>Alpha Mechanical                  | 858.279.1300 x519<br>760.238.3355-C | 858.278.3510 | <a href="mailto:dluhm@alphamechanical.com">dluhm@alphamechanical.com</a> |
| Fred Nagel, CPE<br>Nagel Construction Consultants  | 619.647.1304-C                      |              | <a href="mailto:frednagel@gmail.com">frednagel@gmail.com</a>             |
| Steve Schraibman, CPE<br>Arcor-Inc.                | 858.481.4494<br>619.252-4941-C      | 858.481.4146 | <a href="mailto:steve@arcor-inc.com">steve@arcor-inc.com</a>             |
| Paul Chang, E<br>Sundt Construction<br>(Alternate) | 619.321.4822<br>619.430.3361-C      | 619.321.4932 | <a href="mailto:pmchang@sundt.com">pmchang@sundt.com</a>                 |



American Society of Professional Estimators

**San Diego Chapter 4**  
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# S.D. Mator



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# 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.

***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*