



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



S.D. Mator

February 2016

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Construction at UCSD— Today and Tomorrow's Projects

DATE: TUESDAY, FEBRUARY 16, 2016
TIME: 5:00 PM—Registration & Social Networking
5:45 PM—Announcements
6:15 PM—Dinner Service
followed by the Program

PROGRAM:

CONSTRUCTION AT UCSD—TODAY AND TOMORROW'S PROJECTS TO IMPROVE EDUCATION AND HEALTHCARE FOR THE SAN DIEGO COMMUNITY

PRESENTER:

Mark Rowland
Program Manager & Principal Architect
UCSD Facilities Design & Construction

DINNER MEETING VENUE:

Riverwalk Golf Club
1150 Fashion Valley Road, San Diego

DINNER SERVICE OFFERS ATTENDEES A CHOICE OF CHICKEN MARSALA, TRI-TIP BEEF, OR VEGETARIAN DISH.

COST: \$40 per person
\$25 for full-time students

Cancellations must be received by NOON on Monday, February 22nd or no shows will be billed accordingly.

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

RSVP: 
<http://evite.me/hB7gvpwPJQ>

—OR: Paul Chang, E – Sundt Construction
619.321.4822
aspechapter4@outlook.com

Meeting at a Glance

February Program Notes: Current and Future UCSD Building Projects Help Advance the University's Mission and Achieve Its Strategic Goals

With the leadership of Chancellor Pradeep K. Khosla, UC San Diego has recently developed its first Strategic Plan which establishes a shared mission and vision for their campus and future endeavors.

Mission: UC San Diego will transform California and a diverse global society by educating, generating and disseminating knowledge and creative works, and engaging in public service.

Vision: We will align our efforts to be a student-centered, research-focused service-oriented public university.

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

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Greetings!

In January we did not hold a typical dinner meeting. Instead we held a mixer/social gathering at Ballast Point Brewery in the Miramar area. Though the turnout was low, all who attended seemed to have a great time.



Michael Moyers, CPE

Membership Status:

As of the most recent Chapter Roster issued February 2016 by SBO (Society Business Office), our membership stands at 57. We currently have 24 members who are CPE's 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. You can also contact your Chapter Membership Chairman for assistance at 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.

New Members:

We would like to welcome our newest member, **Aaron Espinoza** from Reno Contracting.


Upcoming Events:

Please join us for our upcoming meeting next week at Riverwalk Golf Resort! We are pleased to have **Mark Rowland**, Program Manager and Principal Architect for UCSD Facilities Design and Construction presenting our program.

Michael D. Moyers, CPE

Best Interiors, Inc.

ASPE San Diego Chapter #4 President



Tim Lackey
President


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Every day campus members make great advancements toward implementation of the Strategic Plan and its stated five transformational goals. From classroom and laboratory renovations to curriculum improvements and new multidisciplinary research centers, the Plan guides decisions and resource allocations, and enables the university to seize opportunities that enhance their distinctiveness, quality and benefit to the local community.

- GOAL 1 Delivering an educational and overall experience that develops students who are capable of solving problems, leading, and innovating in a diverse and interconnected world.
- GOAL 2 Cultivating a diverse and inclusive university community that encourages respectful open dialogue, and challenges itself to take bold actions that will ensure learning is accessible and affordable for all.
- GOAL 3 Nurturing and supporting a collaborative and interdisciplinary research culture that advances the frontiers of knowledge, shapes new fields, and disseminates discoveries that transform lives.
- GOAL 4 Supporting and promoting just and sustainable forms of economic development, shared prosperity and social and cultural enrichment regionally and globally.
- GOAL 5 Creating an agile, sustainable, and supportive infrastructure by ensuring a dedication to service, people, and financial stewardship.

Over the next few years, the university will continue its efforts to think boldly to identify and implement those unique approaches to ensure its continued level of excellence that seeks to fulfill the stated Goals.

Recently completed projects include the following:

- \$3.25M Alex G. Spanos Training Facility Expansion
- \$247.7M Altman Clinical & Transitional Research Facility
- SIO Coastal Meander Trail
- \$6.9M Triton Ballpark

Significant Projects in Planning, Design, or Construction

- \$115M Biological & Physical Sciences Building (Design, Complete in Summer of 2018)
- 110,000 SF 3-Story Center for Novel Therapeutics (Design)
- \$29M East Campus Parking Structure (Construction, Complete in Spring of 2016)
- \$17.5M I-5/Gilman Drive Bridge (Design, Complete in Spring of 2017)
- \$208.6M Graduate & Professional Student and Mixed Use Housing (Design, Complete Fall of 2017)
- \$120M 40,000 SF Outpatient Pavilion (Planning)
- \$17M Satellite Utilities Plant (Design, Complete Fall of 2017)
- \$7.6M Southwest Fisheries Science Center – Building D (Design)
- \$859.4M Jacobs Medical Center (Construction, Complete Summer of 2016)
- Thornton Renovations (Design, Complete Fall of 2017)

The list above demonstrates the variety and breadth of UCSD building and infrastructure projects. The Facilities Design & Construction team has responsibility to oversee the planning, design and construction of these jobs. Their individual Mission, Vision, and Values parallels that of the University:

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

Mission: Leading advancements in design and construction in support of the Mission of UC San Diego. Creatively deliver sustainable environments that promote learning, discovery, diversity, and innovation.

Vision: To heighten the human experience.

Values: Passion – creating inspirational spaces
Integrity – building trust through fairness
Excellence – aspiring to exceed expectations
Collaboration – cultivating respectful engagement
Enjoyment – fulfilling each day
Service – delivering humble stewardship

ASPE San Diego Chapter #4 welcomes Mark Rowland, Program Manager and Principal Architect with UCSD Facilities Design and Construction, to update our members and invited guests about what's happening on campus. Join us on Tuesday, February 16, 2016 to hear him talk about "Construction at UCSD – Today and Tomorrow's Projects to Improve Education and Healthcare for the San Diego Community." His presentation will cover the following topics:

- Overview of UCSD Capital Program
- Discussion about Recently Completed Projects
- Information Relative to Projects Currently on the "Boards" (Under Design)
- Identifying Upcoming Future Projects
- Choosing Appropriate Delivery Systems

We return to Riverwalk Golf Course as our venue for the February dinner meeting. The facility is located at 1150 Fashion Valley Road (take Hotel Circle North or Friars Road to Fashion Valley Road, and then turn west onto Riverwalk Drive to the clubhouse).

Registration and Social Networking starts at 5:00 PM with the Pledge of Allegiance, Introductions, and Announcements occurring at 5:45 PM. Dinner service will commence at 6:15 PM with the program to follow. Attendees will have their choice of Tri-Tip Beef, Chicken Marsala, or a Vegetarian Dish. The cost of the dinner will be \$40.00 per person and \$25.00 per student. Contractors, subcontractors, and suppliers alike should be particularly interested in this month's subject matter.

[Click here](#) to make your reservation through  ... or go to <http://evite.me/hB7gvpwPJQ>.

Or contact Paul Chang with Sundt Construction at (619) 321-4800 or aspechapter4@outlook.com.

Frank E. Young, FCPE

*ASPE San Diego Chapter #4
Programs Committee Chair*

 <p>US CONCRETE PRECAST GROUP <i>Build with US™</i></p>	<p>Todd Ebbert General Manager Southern California tebbert@us-concrete.com</p>
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ASK A CPE

by John T. Balistreri, CPE

ASPE San Diego Chapter #4—Certification Committee Chair

Communication skills and demonstrated writing abilities is a major requirement with obtaining the Certified Professional Estimator credential.

The Technical Paper is the vehicle used to accomplish this task. Along with your application, you must submit three topics of your choice to the Certification Board for review and approval. The Technical Paper must have at least 2,500 words and explain in detail the estimating process for your approved topic. The technical paper must explain “How to estimate the cost of...”



John Balistreri, CPE

There is an official format/syllabus that must be followed. The content of the technical paper should contain the following:

- Cover Page
- Table of contents
- Introduction
 - Main CSI Division
 - Specific Sub Division
 - Brief description of subject matter
- Types and Methods of Measurement
- Specific factors that need to be considered that may affect things like take-off and pricing
 - Small quantities vs. large quantities
 - Geographic location
 - Seasonal effect on work
- Overview of labor, material, equipment, indirect costs, approach and mark-ups
- Special risk considerations
- Ratios and analysis (tools used to test final bid)
- Miscellaneous pertinent information
- Sample Sketch – Required
- Sample Take-off and pricing sheet – Required
- Terminology/Glossary (if required)
- References (non-original material)

After completion, you submit your paper to the Certification board for Format review. The SBO distributes a copy for content review by two certified members. The paper is evaluated with a point system. In order to pass, you must obtain 18 of a possible 30 points. A Paper that has a score of 24 points or higher is considered for publishing in the national magazine *Estimating Today*.

I would like to congratulate **Jenna Swiecki, CPE**, who is with **Cumming Corporation**. Jenna’s technical paper on “How to estimate the cost of Fire Damper Upgrades within a Hospital” was published in the January edition of *Estimating Today*.

Meet the Members of Your Chapter Board ...
Focus on FRANK E. YOUNG, FCPE
Senior Cost Manager—Clarke Project Solutions, Inc.

Frank Young has been part of the local construction community for his entire career, spanning over five decades. The majority of that time was spent working for commercial general contractors including F. E. Young Construction Co., Champion Construction Co., Melhorn Construction Co., and AEL Construction. Since 2003, he has been employed by O'Connor Construction Management, Inc. and has operated as an independent construction consultant with CSOS Consulting. Since June 2015, he has been on assignment for Clarke Projects Solutions to AECOM at the San Diego County Regional Airport Authority, working on the new Rental Car Center. During the past year, he has continued to be involved with the rehabilitation of Westminster Manor, a 16-story high rise structure in downtown San Diego, as a member of the Renovation Committee for their Board of Directors. The 152 units of affordable housing is home to seniors with an active social services outreach.



Frank Young, FCPE

He joined San Diego Chapter #4 in June 1970, received his credential as a Certified Professional Estimator in 1975, and has held offices at the Chapter level from Director to President, and currently serves as Past President and chairs the Programs Committee. He was honored as the Society's Estimator of the Year in 1987-1988, elected Fellow in 2005, and received the first Frank Young Excellence in Education during the 2015 Convention. As a former National President for two terms, a member on the Board of Trustees for several years, and a member of numerous National committees, Frank continues to exhibit his dedication in promoting the Society's Mission. He remains committed to sharing his knowledge and experience in an effort to promote the estimating profession and educational opportunities. The latter commitment is demonstrated by serving on the Advisory Committees for the New School of Architecture + Design's Construction Management program and the Stanley Foster School of Engineering, Innovation and Design (formerly Construction Tech Academy) at Kearny High School, and volunteering as an ACE Mentor for the Hoover High School program.

He is married to Linda Young, NAWIC member and NEF Trustee. She also is an important part of CSOS Consulting, handling the accounting and administrative support for their construction clients. They both enjoy spending time with their immediate family, including the four grandchildren and a nine year-old Schnauzer named "Sarge." He recently celebrated his 76th birthday and plans to remain active in the Chapter until

2020, which will mark 50 years as a member of Chapter #4. ■



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FOR MORE INFORMATION:

Contact **LAURA PARKER, CPE**
619.704.2914 (ofc); 619.977.2817 (cell)
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 Fred Nagel CPE at:

frednagel@gmail.com 619.647.1304

ASPE San Diego Chapter #4

CALENDAR OF EVENTS



◆ **Tuesday, February 16, 2016 (5:00 PM Registration)**

ASPE San Diego Monthly Dinner Meeting

Program: Current and Future Building Projects on the UCSD Campus

Principal Mark Rowland

Speaker: Program Manager & Principal Architect UCSD Facilities Design & Construction

In-House Representatives from Cumming Corp.

Speaker: to review their budgeting database developed for UCSD projects

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

Program: Ethics

Principal Walt Fegley, CEO

Speaker: Reno Contracting

In-House John Wayne Heusner, CPE

Speaker: CRB Builders

Location: Riverwalk Golf Club
1150 Fashion Valley Road, San Diego

◆ **Tuesday, March 22, 2016 (5:30-7:30 PM)**

ASPE San Diego Board of Directors' Meeting

Location: To Be Determined

◆ **Friday, April 8, 2016 and Saturday, April 9, 2016**

ASPE Southwest Regional Meeting

Location: Albuquerque, NM
(Location to be determined)

◆ **Tuesday, April 19, 2016 (5:00 PM Registration)**

ASPE San Diego Monthly Dinner Meeting

Program: Site Tour of the Indoor Skydiving Facility in Downtown San Diego (14th Street and Imperial Avenue)

Hosts & Dinner Representatives from Swinerton Builders

Meeting

Presenters:

Location: The Old Spaghetti Factory
Gaslamp District

◆ **Tuesday, April 26, 2016 (5:30-7:30 PM)**

ASPE San Diego Board of Directors' Meeting

Location: To be determined

◆ **Friday, April 29, 2016 (12:00 PM Registration)**

ASPE San Diego Educational Program:

BID DATE SIMULATION

Lunch: 12:00-1:00 PM

Facilitator: Paul Martin, Herrero Contractors

Instructions: 1:00-1:30 PM

Bid Day 1:30-4:00 PM

Simulation

Program:

Bid Opening 4:00-4:30 PM

& Critique:

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

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
President	Michael Moyers, CPE Best Interiors, Inc.	858.737.7316 619.843.6962-C	858.737.7317	michael.moyers@bestinteriors.net
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2015-2016 Chapter Board of Directors

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American Society of Professional Estimators

San Diego Chapter 4
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Visit our Chapter website at <http://www.aspechapter4.org>



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American Society of Professional Estimators

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Register Today!

For the Tuesday, February 16, 2016
ASPE San Diego Chapter Dinner Meeting ...

**CONSTRUCTION AT UCSD—
TODAY AND TOMORROW'S PROJECTS
TO IMPROVE EDUCATION AND HEALTHCARE
FOR THE SAN DIEGO COMMUNITY**

CONTACT US

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ASPE Certification



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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.

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