



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



S.D. Mator

January 2016

Volume 14, Issue 6

NEW YEAR SOCIAL MIXER

Meeting at a Glance

DATE: TUESDAY, JANUARY 19, 2016

TIME: 5:30-7:00 PM

MIXER VENUE:

Ballast Point Brewery
9045 Carroll Road, San Diego
(North off of Miramar Road)

COST: Drinks and appetizers
ON YOUR OWN

RSVP: Paul Chang
Sundt Construction
619.321.4822
aspechapter4@outlook.com

January Program Notes: Craft Beer Industry Continues Booming in San Diego

In my attempts to gather some background information on the craft beer landscape in San Diego County, I stumbled upon the history of beer making in our area. One of my late uncles on my mother's side of the family, Edward P. Baker, was the President of Aztec Brewing Co. located on Main Street in Barrio Logan. F. E. Young Construction Co. did work for their firm, and that business relationship in the late 1930's resulted in my father meeting and marrying one of Mr. Baker's nieces, my mother. After its sale to the National Brewing Co., the company continued producing beer until 1953 when it ceased local operations.

10 News' Anchor Steve Atkinson described San Diego as the Napa Valley of craft beer in promoting Beer Week in November of 2014. In his segment on 10 News, he talked about the fact that craft beer is one of the fastest growing local industries. Jerry Sanders, former San Diego Mayor and now President and CEO of the San Diego Regional Chamber, told him that this business sector accounts for more than \$300 million annually, and if you factor in tourism and sales, that number increases to \$800 million, more money than generated by Comic-Con. San Diego County has been referred to as "the Craft Beer Capital of America" with its mounting number of breweries, microbreweries, and brewpubs (over 100 as we begin 2016). Based upon 2014 sales, we have four breweries that rank in the top 50 nationwide. The local operations have pioneered the specialty beer style known as Double India Pale Ale or Double IPA.

In 2013, the National University System Institute for Policy Research produced a white paper entitled "The

INSIDE THIS ISSUE ...

January Program Notes	1,3
From Our President	2
Online Construction Classes - Winter Semester 2016	4-5
Become an ASPE Newsletter Sponsor or Advertiser	6
ASPE Membership, Mission Statement & Code of Ethics	6
San Diego Chapter Calendar of Events	7
2015-2016 Officers, Board of Directors, Committees	8
Corporate Sponsors & Monthly Advertisers	9

ATTACHMENTS:

ASPE Certification Summary	10-12
ASPE Code of Ethics	13-17

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

Greetings to all! I hope you all had a Very Happy New Years!

At our December Breakfast Meeting, we again had Alan Nevin with the Xpera Group as our guest speaker. As always, his presentation was both entertaining and informative.



Michael Moyers, CPE

Membership Status:

As of the most recent Chapter Roster issued January 2016 by SBO (Society Business Office), our membership stands at 56. 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 have no new members at this time.


Upcoming Events:

Please read the rest of this issue for additional upcoming events and meetings! [Click here](#) for the Calendar of Events.

Michael D. Moyers, CPE

Best Interiors, Inc.

ASPE San Diego Chapter #4 President



Trinity Grading, Inc.
Lic. # 847643


Tim Lackey
President

P.O. Box 1122
Fallbrook, CA 92088

Phone: (760) 728-2981
Fax: (760) 728-5781
Cell: (619) 520-5576

tlackey@trinitygrading.com
www.trinitygrading.com

Todd Caha, CPE
Senior Estimating Manager



Baker Electric, Inc.

4 Generations since 1938

1298 Pacific Oaks Place • Escondido, CA • 92029
858.566.1980 • 760.745.2001 • Fax 760.745.0292
Direct 760.690.5142
tcaha@baker-electric.com

Economic Impact of Craft Breweries in San Diego.” The Executive Summary of their report highlights four important findings:

- Craft breweries have a significant regional economic impact.
- The economic contribution of craft breweries is more than 1½ times greater than the economic impact of Comic-Con, San Diego’s largest annual convention.
- San Diego’s craft brewing community is growing rapidly.
- Brewery tourism is an important part of San Diego’s visitor’s industry.

The number of jobs created or sustained by the brewery industry in 2011 has been estimated at 2,796, including 497 brewery workers and 1,047 brewpub workers. Large-scale industry events now number in excess of 10, culminating with San Diego Beer Week in early November. The study concludes that craft breweries continue to create jobs, tourism visits, and tax revenues for the local economy. The recent growth may slow, but stronger partnerships and greater research would yield greater tangible benefits. More collaboration between the San Diego Brewers Guild and the San Diego Tourism Authority could increase investment and energy in promoting craft breweries along with other tourist destinations in San Diego County.

San Diego Chapter #4 will usher in 2016 with a **New Year’s Mixer** at the **Ballast Point Brewery** located at 9045



Carroll Way, San Diego, north of Miramar Road between I-15 and I-805. Ballast Point Brewery officially started producing beer in 1996, leased the 107,000 SF Carroll Way facility from H. G. Fenton Co. in late 2013, and completed \$12 million in building improvements the following year. The new German-designed brew house will be capable of producing up to 350,000 barrels per year. The site also includes a tasting room, restaurant, and mezzanine-level office space. Constellation Brands, a massive beverage company headquartered in New York, recently acquired the company for roughly \$1 billion. Constellation’s portfolio encompasses over 100 brands, including Robert Mondavi wines, and Mexico’s Corona, Modelo and Pacifico beers. Jack White, founder and current President of Ballast Point, has stated that “the team at Constellation shares our

values, entrepreneurial spirit and passion for beer, and has a proven track record of helping successful premium brands reach the next level of growth and scale.”

Need a break from the everyday grind and rigors of the construction world? Consider joining us on Tuesday, January 19th from 5:30 PM until 7:00 PM for a beverage of your choosing, some tasty appetizers if desired, and lots of fun and good fellowship. Each attendee will be responsible for the cost of their selection(s). We will try to gather at the high tabletops at the north end of the bar area, next to the copper brew kettles in the adjacent Brewery facility. Unfortunately, we were not able to arrange a brewery tour during our mixer.

Contact Paul Chang with Sundt Construction if you have an interest in participating in this social outing.

Telephone – (619) 321-4800 Email – aspechapter4@outlook.com

Frank E. Young, FCPE

*ASPE San Diego Chapter #4
Programs Committee Chair*

Online Construction Classes for Winter Semester 2016

The following article contains information about online construction courses offered at San Diego State University and selected non-profit construction industry organizations. **Classes start January 11, 2016.** Registrations are currently being accepted by all providers.

Registration options for Winter Semester 2016 classes include:

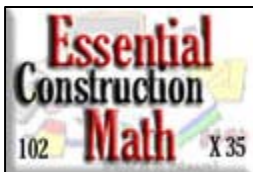
- * 101 Introduction to Construction Estimating
- * 102 Essential Construction Math
- * 103 Construction Blueprint Reading
- * 105 Estimating and Bidding 1
- * 106 Estimating and Bidding 2
- * 107 Construction Materials and Processes
- * 108 Construction Equipment and Methods
- * 114 Estimating Civil and Sitework Construction
- * 202S Oral and Written Communication (STP Unit 2)
- * 204P Contract Documents and Construction Law (STP Unit 4)
- * 205T Planning and Scheduling (STP Unit 3)



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)

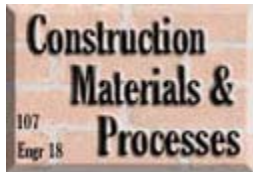
This course features hands-on estimating and quantity take-off activities associated with Metals, Wood, Doors and Windows, Finishes, Electrical, and Mechanical Estimating. By the end of this class students should be able to estimate the conceptual cost of structural metals, prepare quantity take-off 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 5)

Online Construction Classes for Winter Semester 2016

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



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



108 CONSTRUCTION EQUIPMENT AND METHODS Updated (online)

The purpose of this course is to give the student an overall understanding of construction equipment and selected construction methods.

This includes selection, economy and productivity of common construction equipment and construction procedures for site development and industrial, heavy and civil construction. The course will introduce students to civil construction plans, determining earthwork quantities, equipment economics and utilization, equipment production rates, fundamentals of earthmoving and excavating, loading and hauling equipment.

<http://www.constructionclasses.com/css/descriptions/108.htm>

114 ESTIMATING CIVIL AND SITEWORK CONSTRUCTION Updated (online)

This course introduces students to estimating civil engineering, heavy construction projects, and sitework construction projects. This course will cover reading and understanding civil construction plans, determining earthwork quantities, determining crew make-up, and fundamentals of estimating various civil and **site work components**.

<http://www.constructionclasses.com/css/descriptions/114.htm>

202S ORAL AND WRITTEN COMMUNICATIONS, STP 2 Updated (online)

This course is designed to teach you how to become a more effective construction supervisor by becoming a more effective communicator. The skills you learn within the course will be put to use right away!

<http://www.constructionclasses.com/css/descriptions/202S.htm>

204P CONTRACT DOCUMENTS AND CONSTRUCTION LAW, STP 4 Updated (online)

This course focuses on understanding the relationship between contract documents and the construction process. Students will explore contractual relationships, legal roles and responsibilities, contract types, legal issues including regulatory issues, liens, bonds, insurance, general conditions, and how standardized forms are used. Students will also study legal issues that often result in construction disputes including differing site conditions, time and schedule impacts, change orders and changed conditions.

Part of Civil Site Work Certificate <http://www.constructionclasses.com/css/descriptions/204P.htm>

205T PLANNING AND SCHEDULING, STP 3 Updated (online)

Students will learn how to plan, prepare and update construction project schedules in this course. Construction planning will be studied, as well as practice on preparing a project plan. Through the use of case studies, students will learn how to define construction activities, determine activity duration, and assemble the activities into a logical construction schedule. Students will also learn to create and use bar charts and critical path schedules.

Part of Civil Site Work Certificate <http://www.constructionclasses.com/css/descriptions/205T.htm>

To learn more about online CERTIFICATE PROGRAMS, go to:

http://www.constructionclasses.com/certificate_programs.htm

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. ■



\$350 CORPORATE SPONSORSHIP, includes:

- Sponsor Recognition in each of the 12 Monthly Newsletters
- Includes a Hot Link to Either Your Website or Email
- A Full-Page Sponsor Profile in 1 Issue

MONTHLY ADVERTISEMENT:

12 Mo. Issues – 1/4-Page Ad for **\$450**
OR
12 Mo. Issues – Business Card for **\$200**

EMPLOYMENT AD:

\$50 per month (FREE to ASPE Members)

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, January 19, 2016 (5:30-7:00 PM)**
ASPE San Diego Monthly Dinner Meeting
Social "New Year Social Mixer"
Get-Together:
Location: Ballast Point Brewery
9045 Carroll Way, San Diego
(North off of Miramar Road)
- ◆ **Tuesday, January 26, 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 Future Building Projects
Program: on UCSD Campus
Tentative Robin Tsuchida and Mark Rowland
Speakers: UCSD Facilities Design & Construction
In-House To Be Determined
Speaker:
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 Ethics Program
Program: (Principal Speaker to be determined)
In-House John Wayne Heusner, CPE
Speaker: CRB Builders
Location: Riverwalk Golf Club
1150 Fashion Valley Road, San Diego
- ◆ **Tuesday, March 15, 2016 (5:30-7:30 PM)**
ASPE San Diego Board of Directors' Meeting
Location: To Be Determined
- ◆ **Tuesday, April 19, 2016 (5:00 PM Registration)**
ASPE San Diego Monthly Dinner Meeting
Tentative Site Tour
Program: (To Be Determined)
Tentative To Be Determined
Speaker:
Location: To Be Determined
- ◆ **Tuesday, April 26, 2016 (5:30-7:30 PM)**
ASPE San Diego Board of Directors' Meeting
Location: To Be Determined
- ◆ **Friday, April 29, 2016 (12:00-4:30 PM)**
ASPE San Diego Education Program:
BID DATE SIMULATION
Location: National University Technology & Health Sciences Center
3678 Aero Court, San Diego (Kearny Mesa)

	Todd Ebbert General Manager Southern California tebbert@us-concrete.com
	2735 Cactus Road San Diego, CA 92154 Direct: (619) 240-8002 Tel: (619) 240-8000 Cell: (619) 843-3849 Fax: (619) 661-1038 www.sdpc.com
PROVIDING INNOVATIVE SOLUTIONS, QUALITY, AND SERVICE	

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
1st Vice-President	John Balistreri, CPE Kaiser Permanente	619.589.3080 619.861.1131-C	619.589.3192	john.t.balistreri@kp.org
2nd Vice-President	Dan Luckhardt, CPE BNBuilders, Inc.	858.366.0931 619.633.8925-C		daniel.luckhardt@bnbuilders.com
3rd Vice-President	VACANT			
Secretary	James Yu, E Cumming Corp. USA	858.217.3574 858.273.9491-C	858.673.9263	ju@ccorpusa.com
Treasurer	Laura Parker, CPE	619.977.2817-C		lauraparkercpe@gmail.com
Immediate Past President	Frank E. Young, FCPE CSOS Consulting	619.440.5517 619.980.4025-C	619.401.7545	pancho77@cox.net
Executive Administrator	Margy Ashby	619.749.1890 619.593.9988 619.302.3257-C	619.839.3817	info@aspechapter4.org asped4@gasvcs.net
Webmaster	Sharon Jones	619.749.0597	619.749.7097	acsolution@cox.net

2015-2016 Chapter Board of Directors

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



American Society of Professional Estimators
San Diego Chapter 4
 CALIFORNIA
 Visit our Chapter website at <http://www.aspechapter4.org>



Published by San Diego Chapter 4
 American Society of Professional Estimators

S.D. Mator



Register Today!

For the Tuesday, January 19, 2016

NEW YEAR SOCIAL MIXER

at Ballast Point Brewery

CONTACT US

ASPE San Diego Chapter
 127 N. Westwind Drive
 El Cajon, CA 92020-2955

Phone: 619.749.1890

Email: info@aspechapter4.org

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

THE ASPE SAN DIEGO CHAPTER GRATEFULLY
 ACKNOWLEDGES THE GENEROUS SUPPORT OF OUR

CORPORATE SPONSORS

Baker Electric
<http://baker-electric.com>

Balfour Beatty US
<http://www.balfourbeattyus.com>

California Comfort Systems USA, Inc.
<http://www.comfortsystemsusa.com>

CP&M (Construction Planning & Monitoring)
<http://www.edmondsconsultants.com>

Johnson, Finch & McClure Construction, Inc.
<http://jfmcon.com>

Reno Contracting Inc.
<http://renocon.com>

Trinity Grading, Inc.
<http://www.trinitygrading.com>

Waller + Opsal Consulting
<http://www.walleropsal.com>

and

MONTHLY ADVERTISERS

BAKER ELECTRIC, INC.	p. 2
TRINITY GRADING, INC.	p. 2
U.S. CONCRETE PRECAST GROUP	p. 7

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