



S.D. Mator



July 2015

Volume 13, Issue 12

ANNUAL AWARDS DINNER & INSTALLATION

Keynote Speaker: **Walt Fegley—Reno / AGC**

DATE: TUESDAY, JULY 21, 2015
TIME: 5:15 PM—Registration/Social Hour
6:00 PM—Announcements
6:15 PM—Dinner Service Begins
7:15 PM—Program

Chapter Awards Dinner and
Installation of Officers and
Directors for Fiscal Year 2015-16

KEYNOTE ADDRESS:
"ASSESSING OUR INDUSTRY —
ENDURING THE UPS AND DOWNS OF THE
PAST DECADE WILL HELP SHAPE OUR
APPROACH TO THE CHALLENGES AHEAD"

KEYNOTE SPEAKER:
Walt Fegley, LEED AP BD+C
President — Reno Contracting and
President — AGC San Diego Chapter

DINNER MEETING VENUE:
Butcher Shop Steakhouse Restaurant
(Windsor Room)
5255 Kearny Villa Road, San Diego

DINNER MEETING SPONSOR:
ProEst Estimating Software

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

*Cancellations must be received by NOON on Monday,
July 20th or no shows will be billed accordingly.*

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

RSVP: Meredith Stumpo - Turner Construction
858.217.0756; mstumpo@tcco.com

Make your **ENTRÉE CHOICE** when reserving:
Top Sirloin Steak, Salmon, or Vegetarian Pesto Pasta

Meeting at a Glance



July Program Notes: Assessing Our Industry — Enduring the Ups and Downs of the Past Decade Will Help Shape Our Approach to the Challenges Ahead



Walt Fegley

As part of our Annual Awards Dinner, we often invite a prominent construction executive to deliver the keynote address. **Walt Fegley**, President of Reno Contracting, Inc. and current President of the AGC San Diego Chapter, has graciously consented to speak to our

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

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**ASPE San Diego Chapter's 9th Annual Golf Tournament
at Riverwalk Golf Course — Friday, July 31st** 19

As this fiscal year of Chapter #4 is coming to a close, I would like to take a moment to thank all those who served on the Board along with all who served in various other committees in some form or another. It is so important to have a healthy Board for the Chapter to function. As of August 1st, just a few weeks away, I will be starting my 2nd term as President of Chapter #4 with a new Board, new plans and new goals for the upcoming year. I would like to welcome those who will be serving on the Board for the next year. We will be having our annual planning session in a few weeks to set these new plans and goals. I would welcome any comments and/or suggestions you may have to help in this process via email to michael.moyers@bestinteriors.net.



Michael Moyers, CPE

At our June meeting, we were blessed to have **Iraj Ghaemi**, the Director of Airport Facilities with us. He gave us an in-depth view of upcoming projects and an overview of the San Diego International Airport Development Plan through 2035. This was a very interesting and informative presentation.

On another note, our Annual Golf Tournament is just around the corner. The date is July 31st and the location is the Riverwalk Golf Club in Mission Valley. Registration will start at 7:00 AM and a Shotgun Start at 8:00 AM. Hope to see you all there for this day of fun and relaxation.

Dues Renewal: We are at that time of year again. The 2015-2016 Membership Renewal cycle is here. Invoicing has begun and everyone should have received their invoices via email! If you have changed jobs or status in some way and have not updated your contact information with National, you may not have received it. If you do not receive it and/or should you have questions regarding your membership or renewal, please feel free to give me a call at (858) 737-7316 or Tina at the Society Business Office (SBO) at (615) 316-9200. I would like to ask that when your invoice is received, that all of you would take a moment and renew your membership in a timely manner. I hope to see all of you on the roster again for next year and years to come.

Membership Status: As of the most recent Chapter Roster issued July 2015 by SBO, we have a total of 65 members. Currently we have 22 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. Remember, to log in, your User ID is your membership number, and your default password is your email address. You can also contact your Chapter Membership Chairman for assistance at michael.moyers@bestinteriors.net.

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

Upcoming Events:

- A. For our July meeting, we will be having our Annual Awards Dinner and Installation of New Officers/Directors. Not only will we have a great keynote speaker in **Walt Fegley**, President of Reno Contracting, but our Southwest Regional Governor **TJ Schwertfeger CPE** will be coming out from New Mexico to attend and be the Installing Officer of our new Board. The meeting date is July 21st and will be held at the Butcher Shop in Kearny Mesa. Please be sure to mark this meeting on your calendars and plan on attending.
- B. For our August meeting, we will be switching it up a bit. We will be inviting some leading technology firms to present Tabletop Displays and a short discussion regarding their products.
- C. The annual Planning Retreat for new Officers and Directors will be held on Saturday, August 8, 2015. Details will be sent to the existing and new board members shortly.

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

Michael D. Moyers, CPE

Best Interiors, Inc.

President, ASPE San Diego Chapter #4

members and distinguished guests on Tuesday, July 21st during this year's event. His remarks will offer a fresh and forthright viewpoint on the state of the industry and those professionals who strive to further develop their careers. Walt's presentation should provide the perfect opening to help showcase the rest of the evening's program as we celebrate past achievements and share visions for the future.

After discussing the subject matter with our speaker, a recent post on LinkedIn by Jeff Hagen entitled "15 Ways Successful People Approach Life Differently" piqued my interest. It was also reprinted on the *Business Insider* website and seems to provide an appropriate segue to prime our members and guests for the upcoming "state of the industry" observations and prospects for optimizing opportunities. The post notes that successful people are just like unsuccessful people and everyone else in many ways: They come from diverse backgrounds and different types of demographics, achieve various levels of education, and profess unique experience and/or expertise in their fields. However, these individuals exhibit key qualities that set them apart from others.

- Hate playing politics and do not jockey for positions to advance promotions.
- Love when others win and receive recognition for their efforts.
- Desperately desire to see their ideas come to fruition – aspire to make new and exciting things happen.
- Characterized as "meta-thinkers," those who choose to think about the best means and methods to attack goals and challenges.
- Prefer to make or enhance the rules.
- Believe that nothing is sacred; changing paradigms brings about new perspectives and approaches.
- Considered problem solvers.
- Great at self-assessment because they constantly evaluate what they do and work hard to improve processes for tomorrow.
- Embrace feedback and input from colleagues; view feedback and input as enlightening.
- Actively create their future selves and avoid being controlled by external forces.
- Tendency to systemize and remove decisions from their own plate by proper delegation of tasks.
- Leveraging self-reward by tackling the "must do" things before undertaking the "want to do" things.
- Believe in total control over their success or failure.
- Egos can't suffer setbacks because of disappointments or breakdowns.
- Everything is done with intent – successful people don't do random as they have a definite reason for what they do, how they do it, and why they do it.

The above reflections demonstrate why clicking on your LinkedIn account can often bring tidbits of wisdom for the development of careers.

Walt Fegley's presentation will cover the following topics and hopefully stimulate an exchange of ideas during his talk:

1) How Do You as Professional Estimators and Emerging Leaders Fit into the Overall Plan?

What drives companies and how estimators play an important role in their successes or failures.

2) How Did You Cope with the Changes Occurring in the Last 10 Years?

A brief review of the past 15 years and the resultant impact on construction.

3) Where Is Our Industry Going Today and What Elements Affect That Outlook?

The lack of skilled and unskilled workers, the emergence of national firms on the local scene, why we must be more effective and efficient in handling operational aspects.

4) What Must We Do to Succeed in the Future?

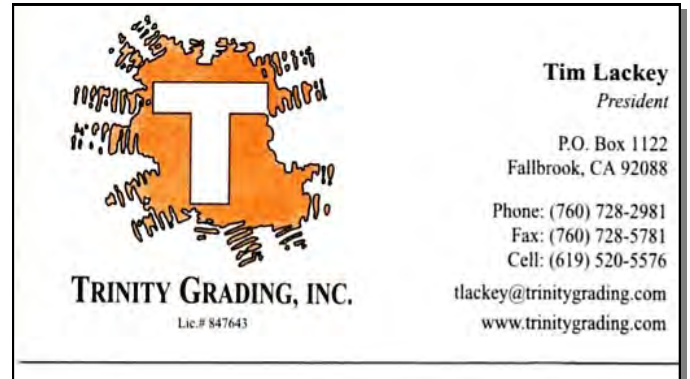
Influences by political and labor elements, embracing the new technologies, and adapting to evolving delivery systems like Design/Build and IPD.

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

Certificates of Appreciation will be distributed to the outgoing Officers and Directors, our Executive Administrator Margy Ashby, and our Website Administrator Sharon Jones.

In addition, awards will be presented in the following categories to pay tribute to those people exhibiting exemplary performance during the past 12 months.

- “Jess Sisk Award” for Outstanding Committee Chair
- “Larry Kian Award” for Outstanding Service to the Chapter
- “President’s Award” for Outstanding Dedication
- Officer-of-the-Year for Outstanding Chapter Officer
- “Special President’s Award” for Noteworthy Contributions to the Chapter
- Member-Firm of the Year
- President’s Plaque with Gavel



Chapter Awards Committeemen Hendrik Degenaar CPE, Mike Moyers CPE, and Frank Young FCPE will conduct this portion of the program. ASPE’s Southwest Regional Governor, **TJ Schwertfeger** from Roadrunner Chapter 47 in Albuquerque, NM, has been asked to bestow the “Al Vallin Award” on our Estimator of the Year. In addition, she will serve as the Installing Officer for the incoming Officers and Directors for Fiscal Year 2015-16.

Dan Luckhardt CPE will be distributing checks to our scholarship winners to further their studies in construction curriculums at local educational institutions.

- **David Calderon** – student at NewSchool of Architecture+Design in their Construction Management program
- **Elijah Elliott** – student at San Diego State University in their Construction and Environmental Engineering program
- **Alexa Rizeq** – student at San Diego State University in their Construction and Environmental Engineering program

Linda Young, co-chair of NAWIC Camp at Kearny High School’s Stanley Foster School of Engineering & Innovative Design (formerly Construction Tech Academy), will have a presentation for ASPE and will show a video on activities associated with their weeklong camping experience for high school girls. **ProEst Estimating Software** has generously offered to serve as this month’s Dinner Meeting Sponsor.



San Diego Chapter #4 returns to the Butcher Shop Steakhouse Restaurant in Kearny Mesa for our dinner meeting. The eatery is located at 5255 Kearny Villa Rd, San Diego (east of Highway 163 and south of Clairemont Mesa Dr.), and we will be using the Windsor Room, just off of the bar. Registration/Social hour will commence at 5:15 PM with announcements at 6:00 PM. Dinner will be served promptly at 6:15 PM with a choice of Top Sirloin Steak, Salmon, or Vegetarian Pesto Pasta. The program will begin as close to 7:15 PM as possible. Members and guests will pay the standard \$40.00 per person while students receive the discounted rate of \$25.00 per person.

REMINDER: Using the Windsor Room at the Butcher Shop requires a minimum of 40 people in attendance for dinner or ASPE has to pay for those meals necessary to reach that quota.

Contact Meredith Stumpo with Turner Construction Co. to make your reservation today.

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

Frank E. Young, FCPE

ASPE San Diego Chapter #4 Programs Committee Chair

ASPE Annual Meeting & Estimating Summit

by John T. Balistreri, CPE — 2nd Vice President, San Diego Chapter #4

This year San Diego was the host for the ASPE Annual Meeting & Estimating Summit located at the Hilton San Diego Resort on Mission Bay.

I was honored to participate as a delegate for ASPE Chapter 4. This event took place Thursday June 25th through Saturday June 27th. Thursday and Friday had an educational and professional development format with 4 classes each day. These classes included top-notch speakers on various subjects including: Forecasted vs Actual Cost for Hospitals in California, Design-Build Best Practices, What Estimators Need to Know about Specifications, Strategies to Win More Profitable Contracts, Estimating and Managing Higher Ed/K-12 Construction Costs, Understanding Different Generations in the Construction Work Place, Lawyers Working with Estimators as an Expert Witness and How a Positive Attitude Can Help You Both Professionally and Personally.

There were numerous sponsors and exhibitors showing the latest available technology. These companies shared all the current software and what it is capable of doing.

Thursday night there was a welcome reception with cocktails and appetizers, followed by a well-received Hospitality Suite hosted by Chapter 4. This was a great opportunity to network with other estimators from across the country.

Friday night was the National Awards Banquet. There were three new awards recognized this year. The first was the Howard S. Prout Award for Certification. This was presented to Howard's family. Howard was an electrical estimator and a former member of Chapter 4. Howard was also a co-chairman on the original Certification Board. The second award was the Merle W. Heckenlively Award for Standards. Merle was the originator of the Standard Estimating Practice Manual. And the third was the **Frank Young Excellence in Education Award**. Frank has always been an advocate for education. He is currently mentoring at Kearny High School in their ACE program. I believe these were well-deserved awards for these three gentlemen with what they have contributed to ASPE and the field of estimating. **San Diego Chapter 4** received a couple of awards as well. The first was the **Superior Chapter Award**; and I am proud to let you know that our very own **Michael Moyers** submitted for and won the **National Chapter President of the Year Award**.

Saturday Morning started off with the Regional Roundtables. During these sessions, local Chapter business was discussed and the most common theme within all the regions was how to boost membership. The local Chapters cannot survive without members and their participation.

Saturday afternoon we had the National Council Business Session. This is where any amendments to the current bylaws were to be heard, discussed and voted on to be changed or remain as written.

Saturday night concluded the weekend activities with the President's Party. The evening started off with cocktails and music offered by a live band, the Retro Rocketts. There was a nice buffet dinner served to attendees, and the rest of the night was spent socializing and dancing to the tunes from the 60's and 70's.

This was my first ASPE Convention and I found it to be a fantastic experience. This was a great opportunity to earn Professional Development Units with excellent speakers. I strongly recommend anybody who may have been on the fence about attending should by all means consider going to next year's Annual Meeting & Estimating Summit in Tampa, Florida. ■




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Meet the Members of Your Chapter Board ...
Focus on PAUL M. CHANG, E
Senior Estimator – Sundt Construction, Inc.



Paul M. Chang

A Peruvian native, **Paul Chang** holds a Technical Degree of Diversified Tool & Die Stamping Specialist from SENATI Institute. He began working in the Mechanical Industry in Sao Paulo, Brazil for one year and Nagoya, Japan for two years.

Paul began his career in Construction in the late 1990s when he began working for a general contracting company (GC Atlantis Inc.) in Dallas, Texas. After four years, Paul was offered an opportunity to work at Vortex Construction Inc. as an estimator (in training).

The focus of the company during his tenure was hospitals, schools, and military projects. Paul worked at Vortex Construction for five years and gained invaluable knowledge as an estimator.

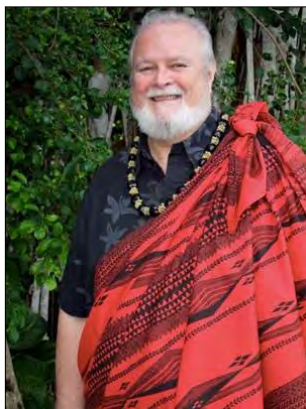
Wanting to expand his knowledge of estimating, Paul was provided an opportunity to work for an established general contracting company, ValleyCrest Landscape Development Inc. in San Diego, California. He was employed by ValleyCrest for one year.

After that year, Paul was offered a more diversified opportunity to work for Balfour-Beatty Construction for which he worked for ten years. During this time, he has been involved in bidding a large variety of Design-Build (Navy and Military) projects and preconstruction estimating (new construction and renovation) for several Unified School Districts in California.

Since 2014, Paul has been working for Sundt Construction as Senior Estimator as a member of the preconstruction team, responsible for preparing budgets, estimates and pre-bid packages for construction projects to be built for clients under the Design-Build and CM At-Risk guaranteed maximum pricing structure.

Paul spends free time with his family of four, enjoying bike rides along the beach and family time together.

Paul is looking forward to the opportunities that will be created with his membership in ASPE. ■



Bob Fyfe CPE

The Passing of Bob Fyfe CPE

It is with great sadness that we must inform ASPE members about the passing of **Bob Fyfe CPE** aka Kaiopua Fyfe, former West Region Governor and member of Golden Gate Chapter #2 in the Bay Area. Bob served both National and his Chapter for a number of years prior to retiring to the Garden Isle of Kauai, including stints as Certification Committee Chair.

On behalf of the Koani Foundation, Kai`opua focused on the international arena promoting awareness, and building support for resolution of a broad range of Hawaiian issues. He was active for many years at the annual UN Permanent Forum on Indigenous Issues in New York City, and partnered these opportunities with informational expeditions to Washington, D.C. In the Hawai'i State Legislature Kai`opua served as clerk of the Senate Hawaiian Affairs Committee and was the elected Lihue, Kauai Delegate to the "Aha Hawaii Oiwii," the Native Hawaiian Convention. He was a student, trainer and facilitator of strategic planning and collaborative leadership for Native Hawaiian community-based development.

In recent years, he worked as a consultant for FEMA, traveling to various catastrophic disaster areas in the United States and its possessions. We will sorely miss his smile, his humor, and his wisdom. ■



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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 Michael Moyers CPE at:

michael.moyers@bestinteriors.net 858.737.7316



ASPE San Diego Chapter #4

CALENDAR OF EVENTS

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

ASPE San Diego Annual Awards Dinner Meeting

Program: Annual Chapter Awards and Installation of Officers/Directors for 2015-2016

Keynote Speaker: Walt Fegley, President of Reno Contracting and President of AGC San Diego Chapter

Installing Officer: TJ Schwertfeger CPE

Southwest Regional Governor

Dinner: Butcher Shop Restaurant

Venue: 5225 Kearny Villa Road, San Diego

◆ **Friday, July 31, 2015 — 7:00 AM to 2:00 PM**

ASPE San Diego Ninth Annual Golf Tournament

– 7:00 AM - Registration & Breakfast

– 8:00 AM - Shotgun Start

– Luncheon & Awards to follow

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

Extended Registration Deadline: Friday, July 17th

[Click here](#) for 7/31 Golf Tournament flyer.

◆ **Saturday, August 8, 2015 — 8:00 AM to 12:00 PM**

ASPE San Diego Annual Planning Retreat

Location: Cumming Corporation
15015 Avenue of Science, Suite 160
San Diego, CA 92128

◆ **Tuesday, August 18, 2015 — 5:00 PM Registration**

ASPE San Diego Monthly Dinner Meeting

Program: Emerging Technologies for Professional Estimators: Tabletop Displays and Presentations by Various Estimating Software Vendors

Dinner: Sheraton La Jolla Hotel

Venue: 3299 Holiday Court, La Jolla

◆ **Tuesday, August 25, 2015 — 5:30 to 7:30 PM**

ASPE San Diego Board of Directors' Meeting

Location: Cumming Corporation
15015 Avenue of Science, Suite 160
San Diego, CA 92128

◆ **Tuesday, Sept. 15, 2015 — 5:00 PM Registration**

ASPE San Diego Monthly Dinner Meeting

Program: Site Tour (to be determined)

Dinner: Catered at Jobsite

Venue:

Location: To be determined

◆ **Tuesday, September 22, 2015 — 5:30 to 7:30 PM**

ASPE San Diego Board of Directors' Meeting

Location: Cumming Corporation
15015 Avenue of Science, Suite 160
San Diego, CA 92128

◆ **Friday, September 25, 2015 — 1:00 to 5:00 PM**

ASPE San Diego Bid Day Simulation Exercise

Moderator: Paul Martin

HerreroBOLDT - San Francisco, CA

Dinner: To be determined

Venue:

Location: To be determined

◆ **Friday, October 2, 2015 — 8:00 AM to 5:00 PM**

Saturday, October 3, 2015 — 8:00 AM to 12:00 PM

ASPE Joint Northwest/Southwest Regional Mtg

Tentative: Ramada Inn

Location: SeaTac Airport—Seattle, WA

◆ **Tuesday, October 20, 2015 — 5:00 PM Registration**

ASPE San Diego Monthly Dinner Meeting

Program: Presentation on September Site Tour

Dinner: To be determined

Venue:

Location: To be determined

◆ **Tuesday, October 27, 2015 — 5:30 to 7:30 PM**

ASPE San Diego Board of Directors' Meeting

Location: Cumming Corporation
15015 Avenue of Science, Suite 160
San Diego, CA 92128

GET INVOLVED IN YOUR LOCAL CHAPTER !!!



TECHNICAL COMMITTEES:

Certification:

John Heusner, CPE

Education:

Dan Luckhardt, CPE

Standards:

John Heusner, CPE

STANDING COMMITTEES:

Chapter Awards

National Awards

Nominations:

Frank Young, FCPE

Bylaws:

Michael Moyers, CPE

Parliamentarian:

PENDING

Communications/ Newsletter

Website:

John Balistreri, CPE

Finance

Ways & Means:

Laura Parker, CPE

Historical:

PENDING

Public Relations

Calendar:

PENDING

Membership:

Michael Moyers, CPE

Programs:

Frank Young, FCPE

OTHER COMMITTEES:

Ethics:

PENDING

Mentoring:

Frank Young, FCPE

Scholarships:

Dan Luckhardt, CPE

Telephone:

Meredith Stumpo

2014-2015 Chapter Officers

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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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2nd Vice-President	John Balistreri, CPE Kaiser Permanente	619.589.3080 619.861.1131-C	619.589.3192	john.t.balistreri@kp.org
3rd Vice-President	VACANT			
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Webmaster	Sharon Jones	619.749.0597	619.749.7097	acsolution@cox.net

2014-2015 Chapter Board of Directors

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Meredith Stumpo Turner Construction	858.217.0756 858.342.0803-C	858.217.0695	mstumpo@tcco.com
Paul Chang, E Sundt Construction (Alternate)	619.321.4800 619.430.3361-C	619.321.4932	pmchang@sundt.com



Published by San Diego Chapter 4
American Society of Professional Estimators

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Register Today!

For the Tuesday, July 21, 2015
ASPE San Diego Chapter #4
Dinner Meeting ...

**Annual Awards Dinner Meeting:
Keynote Address by Walt Fegley**

CONTACT US

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127 N. Westwind Drive
El Cajon, CA 92020-2955

Phone: 619.749.1890

Email: info@aspechapter4.org

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

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The American Society of Professional Estimators Code of Ethics

Introduction

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

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

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

Preamble

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

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

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

Canon #1

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

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

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

Canon #2

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

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

Canon #3

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

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

Canon #4

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

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

Canon #5

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

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

Canon #6

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

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

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

Canon #7

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

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

Canon #8

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

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

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

Canon #9

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

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

Revision May, 2011

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.



Ninth Annual Golf Tournament

Friday July 31, 2015



A Benefit for the ASPE San Diego Chapter #4 Scholarship Program.

RIVER WALK GOLF COURSE

1150 Fashion Valley Road
San Diego, CA 92108

\$175.00 PER PLAYER (\$650 - Foursome)

Includes breakfast, luncheon, beverage tickets,
green fees, range balls, giveaways

SCHEDULE OF EVENTS

7:00 AM – Registration & Breakfast

8:00 AM – Shotgun Start

Luncheon & Awards to Follow

SPONSORSHIPS

GOLD - \$1,200

(Includes 4 Players, logo on registration
banner, hole/exhibitors signage and
food & beverage sponsor)

SILVER - \$900

(Includes 4 Players, logo on registration
banner and hole/exhibitors signage)

BRONZE - \$250

(Hole/exhibitors signage)

ASPE San Diego Chapter #4 - SCHOLARSHIP PROGRAM

http://www.aspenational.org/Education_Scholarship_Fund.aspx



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REGISTRATION FORM

Registration Deadline – Friday, July 17, 2015

Company: _____

Address: _____

Name: _____

City/Zip: _____

Sponsorships: **Gold** **Silver** **Bronze** Phone: _____

Golf Only: **Individual** **Foursome**

____ Qty x \$ _____ = TOTAL \$ _____

Golfer 1: _____

Golfer 2: _____

Golfer 3: _____

Golfer 4: _____

Checks payable to: **ASPE SAN DIEGO CHAPTER #4**

Addressed to: **Waller Consulting**

2111 West California Street, San Diego, CA 92110

Credit Card: **Call/Email Christiana for a PayPal** 

Money Request email. (3.5% convenience fee will apply)