



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



# S.D. Mator

July 2016 Volume 14, Issue 12

**Chapter Awards Dinner, FY 2016-17 Board Installation and "A Discourse About Design"**

**Meeting at a Glance**

**DATE:** TUESDAY, JULY 26, 2016  
**TIME:** 5:15 PM—Registration & Social Hour  
 6:00 PM—Announcements  
 6:15 PM—Dinner Service  
 7:15 PM—Program

**PROGRAM:**  
**CHAPTER AWARDS DINNER & INSTALLATION OF OFFICERS AND DIRECTORS FOR FY 2016-2017**

**INSTALLATION OFFICER:**  
**Robert George CPE**  
*Former Chapter President, National Education Committee Chair, and National President*

**KEYNOTE SPEAKER:**  
**Marvin Malecha FAIA**  
*President*  
**NewSchool of Architecture + Design**

**KEYNOTE ADDRESS:**  
**"A DISCOURSE ABOUT DESIGN"**

**MEETING LOCATION:**  
**Riverwalk Golf Club**  
*1150 Fashion Valley Road, San Diego*  
 DINNER SERVICE OFFERS ATTENDEES A CHOICE OF TRI-TIP BEEF, SALMON OR VEGETARIAN DISH.

**COST: \$40 per person**  
**\$25 for full-time students**  
*Cancellations must be received by NOON on Monday, July 25<sup>th</sup> or no shows will be billed accordingly.*

**RSVP: **  
<http://evite.me/2n3jCvTFg3>

—OR: Paul Chang, E – Sundt Construction  
 619.321.4822 [aspechapter4@outlook.com](mailto:aspechapter4@outlook.com)

## July Program Notes: Chapter Awards Dinner and Installation of Officers and Directors for Fiscal Year 2016-2017, including "A Discourse About Design"

As part of our Annual Awards Dinner, we target a prominent personality in the design or construction profession to deliver the keynote address. This year we have invited the new President and Chief Academic Officer of the NewSchool of Architecture + Design, Marvin Malecha FAIA, to bring us his message about the current state of affairs in architecture and engineering. In a news release after the announcement about his

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

### INSIDE THIS ISSUE ...

July Program Notes.....	1,3,6
From Our President .....	2
ASPE Chapter 4 Scholarship Committee Announcement .....	4
Meet a Member of Your Chapter Board: Fred Nagel CPE .....	5
Meet a New Member of Your Chapter: Mark Olsen.....	6
Employment Opportunity from DPR Construction.....	7
Become an ASPE Newsletter Sponsor or Advertiser .....	8
ASPE Membership, Mission Statement & Code of Ethics.....	8
San Diego Chapter Calendar of Events .....	9
2015-2016 Officers, Board of Directors, Committees.....	10
Corporate Sponsors & Monthly Advertisers .....	11
<b>ATTACHMENTS:</b>	
ASPE Certification Summary .....	12-14
ASPE Code of Ethics .....	15-19

**G**reetings!

Last month, Turner Construction hosted a tour of the new Ballpark Village project currently under construction in downtown San Diego. After touring the site, most who attended met up at The Old Spaghetti Factory a few blocks away for dinner, fellowship and good conversation.

Last week was the 2016 Annual Estimators Forum and National Business Session in Tampa Bay. We had four attendees at the Estimators Forum on Thursday and Friday, with two of us staying and attending the National Business Session on Saturday. We should have a full report in our newsletter next month. One item that I would like to mention at this writing is that the Proposed National Bylaws rewrite passed at the Business Session. We will be hearing more about this in the coming months.



*Michael Moyers, CPE*

### **Dues Renewal:**

We are at that time of year again. The 2016-2017 Membership Renewal cycle is here. Invoicing has begun, and everyone should have received their invoice via email by now. If you have changed jobs or status in some way and have not updated your contact information with National, you may not receive it. If you do not receive it and/or should you have questions regarding your membership or renewals, please feel free to give me a call at (858) 737-7316 or Tina at SBO at (615) 316-9200. **Please note that they are due by July 1, 2016.**

When your invoice is received, I would like to request that all of you take a moment to 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 2016 by SBO (Society Business Office), our membership stands at 61. We currently have 26 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](http://www.aspenational.org). You can also contact your Chapter Membership Chairman for assistance at [frednagel@gmail.com](mailto:frednagel@gmail.com).

For those of you who have thought of becoming more involved in our Chapter, we could always use the help. If you are interested, please contact me at (858) 737-7316 or email me at [Michael.moyers@bestinteriors.net](mailto:Michael.moyers@bestinteriors.net).

### **New Members:**

We welcome **Sarah Williams from DPR Construction** as our newest member.

### **Upcoming Events:**

Please join us this upcoming Tuesday night for our Annual Awards Dinner and Installation of your 2016/2017 Officers and Directors.

**Michael D. Moyers, CPE**

Best Interiors, Inc.

*President, ASPE San Diego Chapter #4*

**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](mailto:tcaha@baker-electric.com)

appointment to that position in January 2016, Marvin remarked that “San Diego itself is an emerging new urban Center that’s truly unique with an interesting mix of high-tech, high education and research, paired with a young population that’s remaking the image of the city. I see a real convergence of energy here and look forward to pushing open the doors so practitioners and instructors can collaborate freely in discourse, connecting the students with the practice of their discipline and broadening their perspectives.”

Marvin has over 40 years of experience in academics, architecture and global design education. His most recent position was as dean of the College of Design and professor of architecture at North Carolina State University. Prior to that tenure, he served as dean of the College of Environmental Design at CalPoly, Pomona. He earned his Bachelors degree in architecture from the University of Minnesota, and his Masters degree from Harvard University’s Graduate School of Design. Marvin has been a past president of the Association of Collegiate Schools of Architecture (1989-1990) and the AIA (2008-2009). He is a noted author and past recipient of numerous awards including the Topaz Medallion for Excellence in Architectural Education in 2003. The San Diego community is fortunate to have such a distinguished individual to lead NewSchool into the future.

Following dinner, 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 for their hard work 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
- Member-Firm of the Year
- President’s Plaque with Gravel

Mike Moyers CPE, and Frank Young FCPE, as members of the Chapter Awards Committee, will conduct this portion of the program. We will be honoring the recipient(s) of special National Awards distributed during the Awards Dinner at the Annual Meeting & Estimating Summit in Tampa, FL.

Former ASPE Chapter President, National Education Committee Chair, and National President Robert George CPE has been asked to serve as the Installing Officer for the incoming Officers and Directors for Fiscal Year 2016-17. He has also requested time to address the group with a few remarks.

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

- **Julio Leyva Campos** – student at NewSchool of Architecture + Design in their Construction Management program
- **Kolab Jihad** – student at San Diego State University in their Construction and Environmental Engineering program
- **Christian Robles** – 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. We are still finalizing arrangements for a Member-Firm to serve as this month’s Dinner Meeting Sponsor.

Riverwalk Golf Club, located at 1150 Fashion Valley Road, San Diego (north of I-8 between Friars Road and Hotel Circle North, just west of the Fashion Valley Shopping Center), will again host our dinner meeting. Registration/Social

[\(cont'd on pg 6\)](#)

# The American Society of Professional Estimators Chapter 4 Scholarship Committee Announcement

*by Daniel Luckhardt CPE*

On behalf of The American Society of Professional Estimators Scholarship Committee, the Board of Directors, and the Chapter 4 Membership, I am pleased to announce the recipients of the 2016 Scholarship Awards:

***Jihad Kotb***

Construction Engineering  
San Diego State University  
One thousand and no/100 dollars - \$1,000

***Christian Robles***

Construction Engineering  
San Diego State University  
One thousand and no/100 dollars - \$1,000

***Julio Leiva Campos***

Construction Management  
NewSchool of Architecture + Design  
Five hundred and no/100 dollars - \$500

As ASPE members and individuals affiliated with our profession, please join us at our annual awards dinner meeting on Tuesday, July 26<sup>th</sup> at the Riverwalk Golf Club (1150 Fashion Valley Road, San Diego, CA 92108), where you will have a chance to meet in person our 2016 class of Scholarship Recipients at our social hour (beginning at 5:00 P.M.).

<https://www.google.com/maps/place/Riverwalk+Golf+Club/@32.7649553,-117.1748646,15z/data=!4m5!3m4!1s0x0:0x1c1a6b3ac9389293!8m2!3d32.7649553!4d-117.1748646>

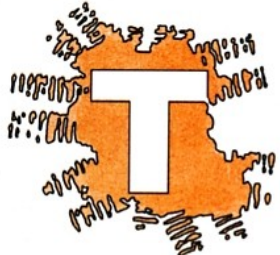
On behalf of the Scholarship Committee, we would like to thank all the student applicants for taking the time to submit their information to the committee for award consideration.

**Daniel Luckhardt, CPE**

Scholarship Award Committee Chairman

[daniel.luckhardt@bnbuilders.com](mailto:daniel.luckhardt@bnbuilders.com)

619.633.8925



**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](mailto:tlackey@trinitygrading.com)  
[www.trinitygrading.com](http://www.trinitygrading.com)

**TRINITY GRADING, INC.**  
Lic. # 847643

**Meet the Members of Your Chapter Board ...**  
**Focus on FRED NAGEL, CPE**  
**Fairlead LLC, Nagel Construction Consulting, Inc., Xpera Group**

**B**orn in Detroit Michigan, Fred, at age ten, traveled west with his family to the Sacramento area. At age 13 he had already taken a summer apprentice laborer/carpenter job helping a master builder to build high-end custom homes. At first it was digging ditches for the concrete footings, but eventually it became a bona fide challenge. Pounding nails turned itself into reading and interpreting plans, ordering the lumber, and eventually, years later, helping to run the troops.



*Fred Nagel CPE*

All while being out there earning a paycheck, he continued his schooling, graduated High School, jumped into college to earn a Bachelor's and a Master's Degree, and followed his passion to become a master craftsman. In his mid-20's, Fred decided that he needed to learn more about the commercial construction world so he joined the union, even though he was now already becoming a journeyman level carpenter, attended apprentice school for two years. As a union carpenter, over the course of several years, he landed numerous jobs working on various projects including a large heavy-wood-beam resort-style hotel, several steel-framed midrise office buildings, and a number of tilt-up concrete office/warehouses. The company that was building the latter (Murchison Construction) liked what they saw in Fred and invited him to stay on full time. Soon he was in the job shack doing take-offs, ordering materials, and helping to manage the team, as assistant to the superintendent. His later management style began to emerge as demanding but fair. With a smile on his face, he found a way to get the best from himself and his team. Before long he decided that he wanted to have his own business.

It was time to move to a better climate – off to San Diego with his wife Margaret. Here Fred started his new company, Nagel Custom Interior Woodwork. His first marketing effort? Sneak into Fairbanks Ranch and write down all the General Contractor's names and numbers working on the luxury homes in the Ranch. With a little effort and a bit of luck, he landed his first contract – hanging doors. Seven years and several very large high-end finish carpentry jobs later, his company was "sittin' in high cotton." But alas, challenges come along when you least expect them.

A good friend and colleague (and "cost of repair" expert witness), Paul Hastie, asked Fred if he could help to build "a trial model" to be used in the courtroom to illustrate the faulty construction of a leaking deck in a large condominium complex that was embroiled in this lawsuit. Fred said, "No problem." The next thing he knew he had shut down his own business and, for two years, became Paul's right-hand man, providing estimating services on several construction lawsuits. A new passion for construction consulting and estimating was born.

A friend of Paul's happened to be the VP of Estimating (and President of ASPE Chapter 4) at Barnhart Construction (now Balfour Beatty). He asked Fred to do a framing estimate for a school – then he asked him to come on full time with Barnhart. He took the job and worked as Senior Estimator there for five years. From there, Fred wanted to explore the consulting side of the business. After a brief stint at Cumming Corp, he landed a position with Gafcon, Inc., a San Diego-based construction management and consulting firm, where he worked for over five years. There he honed his skills as a senior level cost manager and testifying cost expert – there, he immersed himself in the world of construction consulting, as well as becoming a CPE and a LEED AP. Never one to turn down a challenge, he decided to take a position as Director of Estimating with the San Diego Division of Swinerton Management and Consulting where he stayed for three years.

Since leaving Swinerton, Fred has worked as an independent consultant (Nagel Construction Consulting, Inc.) with a number of consulting and construction companies as both project manager and senior level cost estimator: Downey Group, Seville Group (SGI), Greenhouse International, Diehl Contracting and, most recently, Xpera Group.

Just three months ago he teamed with a longtime colleague and trusted friend, Frank Downey, to start a cost and management consultancy firm called Fairlead LLC. The next challenge on the horizon, they already have four projects that they are working on and the promise of several more.

A longtime member and Board member with ASPE Chapter 4 has been a commitment he often cites as one of his most important professional associations. As Fred agrees, it has been a circuitous route but one that he wouldn't have had any other way.

Fred is also an avid sailboat racer, garage jazz guitarist, and weekend hacker on the golf course. ■



**Meet a New Member of Your Chapter ...**  
**Focus on MARK OLSEN, CPE**  
**Madsen, Kneppers & Associates, Inc.**



*Mark Olsen, CPE*

**M**ark Olsen was born and raised in the Seattle area. In 2005, he graduated with honors from Arizona State University with a B.S. in Urban Planning. His professional career began with land acquisitions for Richmond American Homes and the supervision of new home construction for Toll Brothers. Mark then transitioned to a Project Engineer for a General Contractor overseeing the construction of new commercial developments and renovations of municipal and educational facilities.

In 2011, Mark relocated to San Diego and oversaw the rehabilitation of homes for Pacifica Companies and Aslan Realty Group. He then became a Senior Project Manager for Mission Restoration which specialized in the handling of property insurance claims. His 10 years of experience with estimating and managing a variety of construction projects landed him his current position with the consulting firm, Madsen, Kneppers and Associates, Inc. Mark now travels nationwide providing consulting services for Insurance Carriers, Attorneys, Contractors and Building Owners relating to catastrophic events, property losses, builders risk claims and defective construction.

Madsen, Kneppers & Associates and their clients highly value the CPE title, and Mr. Olsen looks forward to putting his recently acquired title to good use.

In his spare time, Mark is either restoring his house or his 1968 Firebird 400 Convertible. He is getting married in October of this year, and his fiancée and he both enjoy traveling, hiking, camping, cycling and surfing.

On behalf of the ASPE San Diego Chapter 4 Board and membership, Mark, we welcome you as a new member and look forward to your participation in the Chapter.

**Michael D. Moyers, CPE**  
Best Interiors, Inc  
*President*  
*ASPE San Diego Chapter 4*

## **July Program Notes**

*[cont'd from pg 3](#)*

hour will commence at 5:15 P.M. with announcements at 6:00 P.M. Dinner will be served promptly at 6:15 P.M., and the program will begin at 7:15 P.M. Attendees will have their choice of Tri-Tip Beef, Salmon, or Vegetarian Dish at the normal pricing structure of \$40 per person and \$25 per student.

Invite a colleague to join us on Tuesday, July 26<sup>th</sup>.

[Click here](#) to make your reservation through 

... or go to <http://evite.me/2n3jCvTFg3>.

Or contact Paul Chang at Sundt Construction to make your reservations for this important event.

Telephone: (619) 321-4822    Email: [aspechapter4@outlook.com](mailto:aspechapter4@outlook.com)

**Frank E. Young, FCPE**  
*ASPE San Diego Chapter #4*  
*Programs Committee Chair*



## Employment Opportunity

DPR Construction is seeking an Estimator with at least 3+ years of commercial construction estimating experience for our San Diego, CA region.

Estimators will work primarily on negotiated commercial projects within our core markets. Estimators will work closely with Architects, Engineers, Owners and Subcontractors and are preferred to have the following skills:

- Experience preparing detailed conceptual cost estimates and conceptual cost studies from schematic or feasibility level documentation.
- Ability to prepare detailed estimate updates, as the design evolves, including preparing variance summaries between estimates.
- Knowledge and understanding of unit costs and the factors that affect construction cost.
- Ability to prepare detailed instructions to bidders, trade specific clarifications and comprehensive bid packages.
- Experience writing and negotiating subcontracts.
- Prepared to participate and often lead the preparation of cost/budget information to the Customer/Owner.
- Willingness and desire to actively participate in Value Engineering sessions with the project team and design team.
- Experience as a member of the team involved in Request for Proposal Responses (RFP's) and the formal presentation for a project.
- Ability to develop business with new and existing Customers.

We are looking for a flexible, detail-oriented team player with the ability to manage multiple tasks, produce quality work and consistently meet deadlines. The successful candidate will possess:

- Excellent listening skills and have strong communication skills
- Ability to identify and resolve complex issues
- Effective participation in team environment
- Proficient computer skills in Microsoft Office Suite, Estimating Software (Timberline or WinEst), Project Management software (Prolog or similar), and Scheduling software (Primavera or similar)
- Bachelor's Degree
- A strong work ethic and "can-do" attitude

Contact Debbie Wharton – [debbiew@dpr.com](mailto:debbiew@dpr.com)



### **\$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](mailto:lauraparkercpe@gmail.com)



### **ASPE MISSION STATEMENT**

The American Society of Professional Estimators serves construction estimators by providing education, fellowship and the opportunity for professional development.

[Click here for ASPE's CODE OF ETHICS.](#)

### **ASPE Membership**

An accurate cost estimate is the first of many key components of a successful construction project. Plan interpretation, labor and material costs, scheduling costs, and level of difficulty recognition are a fraction of the skills necessary to become a successful estimator.

Why join the American Society of Professional Estimators? ASPE is the most recognized and credentialed group of construction cost professionals in our nation's construction industry. ASPE provides education, industry information, and fellowship to all levels of our members. It is made up of professionals of several different classifications.

- A- **Estimator**—shall have at least five years' experience as an estimator in one or more of the construction estimating disciplines.
- B- **Constructor**—shall be an active construction professional experienced in one or more of the construction disciplines with at least 5 years' experience.
- C- **Associate Member**—is a Member with less than 5 years of experience as an estimator or an active construction professional. When the Member achieves 5 years of experience, the Member shall be given one of the Member classifications listed above.

One of the ultimate goals of a member in ASPE is to achieve status as a "Certified Professional Estimator," otherwise know as "CPE." CPE status is recognized by Builders, Government Agencies, Developers, and many other Corporate entities as the highest level of qualification as an estimator. Educational training is available to become part of this elite group of professionals.

ASPE San Diego Chapter 4 is perennially recognized as one of the top chapters of the nation's 50 chapters. The local chapter meets on the third Tuesday of each month. This general membership meeting offers education and insight into our industry. Each membership meeting is highlighted by presentations and guest speakers, with information pertinent to our ever-changing industry.

If you would like to become part of this exciting group of professionals, please contact Fred Nagel CPE at:

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



# ASPE San Diego Chapter #4

## CALENDAR OF EVENTS



- ◆ **Thursday, July 14, 2016—Saturday, July 16, 2016**  
**ASPE Annual Meeting & Estimating Summit**  
**Location:** Renaissance Plaza International Hotel  
*Tampa, Florida*
  
- ◆ **Tuesday, July 26, 2016 (5:00 PM Registration)**  
**ASPE San Diego Annual Awards & Installation Dinner Meeting**  
**Program:** Presentation of Scholarships, Chapter Awards, and Installation of Officers/Directors  
**Keynote Speaker:** Marvin Malecha, FAIA  
*President*  
*NewSchool of Architecture + Design*  
**Installing Officer:** Bob George, CPE  
*Former Chapter President and National President*  
**Dinner Venue:** Riverwalk Golf Club  
*1150 Fashion Valley Road, San Diego (Mission Valley)*
  
- ◆ **AUGUST ...**  
**ASPE San Diego Annual Planning Retreat**  
**Date & Time:** *To be determined*  
**Location:** *To be determined*
  
- ◆ **Tuesday, August 16, 2016 (5:00 PM Registration)**  
**ASPE San Diego Monthly Dinner Meeting**  
**Program:** Summer Social  
**Networking and Social:** Stone Brewing  
*2816 Historic Decatur Road*  
**Hour Venue:** *San Diego (Liberty Station, Point Loma)*
  
- ◆ **Tuesday, September 20, 2016 (5:00 PM Registration)**  
**ASPE San Diego Monthly Dinner Meeting**  
**Program:** Visit to the Offices of Sundt Construction  
**Location:** *1660 Hotel Circle North, Suite 400 San Diego (Mission Valley)*  
**Dinner Venue:** *Catered by Phil's BBQ*
  
- ◆ **Tuesday, September 27, 2016 (5:30-7:30 PM)**  
**ASPE San Diego Board of Directors' Meeting**  
**Location:** *To be determined*
  
- ◆ **Tuesday, October 18, 2016 (5:00 PM Registration)**  
**ASPE San Diego Monthly Dinner Meeting**  
**Program:** Site Tour and Dinner Meeting  
*Presentation for Jobsite*  
**TO BE DETERMINED**  
**Location:** *To be determined*  
**Dinner Venue:** *To be determined*
  
- ◆ **Tuesday, October 25, 2016 (5:30-7:30 PM)**  
**ASPE San Diego Board of Directors' Meeting**  
**Location:** *To be determined*
  
- ◆ **Tuesday, November 15, 2016 (5:00 PM Registration)**  
**ASPE San Diego Monthly Dinner Meeting**  
**Program:** Presentation by ProEst Software  
**Speaker(s):** Jeff and John Gerardi  
**In-House Speaker:** *To be determined*  
**Location:** Riverwalk Golf Club  
*1150 Fashion Valley Road, San Diego*

	<b>Todd Ebbert</b> 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
<b>President</b>	Michael Moyers, CPE Best Interiors, Inc.	858.737.7316 619.843.6962-C	858.737.7317	<a href="mailto:michael.moyers@bestinteriors.net">michael.moyers@bestinteriors.net</a>
<b>1<sup>st</sup> Vice-President</b>	John Balistreri, CPE Kaiser Permanente	619.589.3080 619.861.1131-C	619.589.3192	<a href="mailto:john.t.balistreri@kp.org">john.t.balistreri@kp.org</a>
<b>2<sup>nd</sup> Vice-President</b>	Dan Luckhardt, CPE BNBuilders, Inc.	858.366.0931 619.633.8925-C		<a href="mailto:daniel.luckhardt@bnbuilders.com">daniel.luckhardt@bnbuilders.com</a>
<b>3<sup>rd</sup> Vice-President</b>	VACANT			
<b>Secretary</b>	James Yu, E Cumming Corp. USA	858.217.3574 858.273.9491-C	858.673.9263	<a href="mailto:jyu@ccorpusa.com">jyu@ccorpusa.com</a>
<b>Treasurer</b>	Laura Parker, CPE	619.977.2817-C		<a href="mailto:lauraparker@ccpe.com">lauraparker@ccpe.com</a>
<b>Immediate Past President</b>	Frank E. Young, FCPE CSOS Consulting	619.440.5517 619.980.4025-C	619.401.7545	<a href="mailto:pancho77@cox.net">pancho77@cox.net</a>
<b>Executive Administrator</b>	Margy Ashby	619.749.1890 619.593.9988 619.302.3257-C	619.839.3817	<a href="mailto:info@aspechapter4.org">info@aspechapter4.org</a> <a href="mailto:asped4@gasvcs.net">asped4@gasvcs.net</a>
<b>Webmaster</b>	Michael Moyers, CPE Best Interiors, Inc.	858.737.7316 619.843.6962-C	858.737.7317	<a href="mailto:michael.moyers@bestinteriors.net">michael.moyers@bestinteriors.net</a>

## 2015-2016 Chapter Board of Directors

Director	Phone	Fax	Email
John W. Heusner, CPE CRB Builders	760.444.3319	760.496.3711	<a href="mailto:johnwheusner@san.rr.com">johnwheusner@san.rr.com</a>
David Luhm, E Alpha Mechanical	858.278.3500 x519 760.238.3355-C	858.278.3510	<a href="mailto:dluhm@alphamechanical.com">dluhm@alphamechanical.com</a>
Fred Nagel, CPE Nagel Construction Consultants	619.647.1304-C		<a href="mailto:frednagel@gmail.com">frednagel@gmail.com</a>
Steve Schraibman, CPE Arcor-Inc.	858.481.4494 619.252.4941-C	858.481.4146	<a href="mailto:steve@arcor-inc.com">steve@arcor-inc.com</a>
Paul Chang, E Sundt Construction (Alternate)	619.321.4822 619.430.3361-C	619.321.4932	<a href="mailto:pmchang@sundt.com">pmchang@sundt.com</a>



American Society of Professional Estimators

**San Diego Chapter 4**  
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, July 26, 2016  
ASPE San Diego Chapter Dinner Meeting ...

**CHAPTER AWARDS DINNER AND  
INSTALLATION OF OFFICERS & DIRECTORS  
AND "A DISCOURSE ABOUT DESIGN"**

### CONTACT US

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

Phone: 619.749.1890

Email: [info@aspechapter4.org](mailto: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. ....	<a href="#">p. 2</a>
TRINITY GRADING, INC. ....	<a href="#">p. 4</a>
U.S. CONCRETE PRECAST GROUP .....	<a href="#">p. 9</a>

# 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*