



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



S.D. Mator

March 2016

Volume 14, Issue 8

Our Ethical Code—But This Is Business!

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

PROGRAM:

OUR ETHICAL CODE — BUT THIS IS BUSINESS!

PRESENTER:

Walt Fegley
President & CEO
Reno Contracting, Inc.

DINNER MEETING VENUE:

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, March 14th or no shows will be billed accordingly.

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

RSVP: 
<http://evite.me/TW9k6YWKNu>

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

Meeting at a Glance

March Program Notes: Our Ethical Code — But This Is Business!

March usually marks that time on the Chapter's calendar to present a program on Ethics. We have invited Walt Fegley, President and CEO of Reno Contracting, Inc., to make a return appearance to address our group. His talk will focus on differentiating between business ethics and personal ethics in our role as professional estimators for contracting firms. An added feature to the evening's agenda will include a message from John Wayne Heusner CPE with CRB Builders on the practice of soliciting bids based upon "Best & Final Pricing."

I think that we all can generally agree that ethics becomes a matter of knowing the difference between what is right and wrong and that assessment shapes our

(cont'd on pg 3)

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Greetings!

If you missed our February dinner meeting, you missed a great presentation of all the work that is coming up at UCSD over the next few years. We were pleased to welcome **Mark Rowland, Program Manager & Principal Architect for UCSD Facilities Design and Construction** to presenting our program. Mark touched on past projects, current projects, as well as future projects at UCSD.



Michael Moyers, CPE

In other news, I am pleased to announce that we have started the process of re-designing our website. I am excited about this project and can't wait to bring it online! A few of us will be working with our new web host over the next 6 weeks to make it come to a reality. By our next Newsletter, we should know the launch date of our new site.

On April 8th and 9th, John Balistreri and I will be attending the ASPE Southwest Region Spring Regional Meeting. We will have a report in our next Newsletter.

Membership Status:

As of the most recent Chapter Roster issued February 2016 by SBO (Society Business Office), our membership stands at 58. Currently we have 24 members who are CPE's and one FCPE. As a reminder to all members ... If you have changed jobs, are in between jobs, retired or have had to relocate, please update your status/contact information online at www.aspenational.org. You can also contact your Chapter Membership Chairman for assistance at frednagel@gmail.com.

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

New Members:

We would like to welcome our newest member, **Dan Kilcoyne from California Panel Systems in El Cajon.**

Upcoming Events

It's that time of year again where we hold our Annual Ethics Dinner Meeting and Program. Please join us for this upcoming meeting next week at Riverwalk Golf Resort! This year we are pleased to have **Walt Fegley, President & CEO of Reno Contracting** as our main speaker.

In April, we have an exciting site tour and dinner meeting presentation. We will be touring the new Airborne San Diego Indoor Skydiving Facility. Please mark your calendars.

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

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behavior. Everyone, whether knowingly or subconsciously, approaches life with a certain moral or ethical framework which has often been cultivated early in our childhood. As we grow and mature, those viewpoints may change, but the fundamental framework does not simply disappear from our persona. Those same characteristics serve as the foundation for small businesses to formulate the guiding principles for running their organizations.

Business ethics should be concerned with applying that same framework to the way in which a company chooses to operate in the marketplace. Business ethics has both normative and descriptive elements:

The normative part – understanding how the behavior exhibited by yourself and your employees are related to cultural issues or social upbringing. Small businessmen need to understand how their personal beliefs affect the choices in the decision-making process.

The descriptive part – incorporating “best practices” into your firm’s policies and procedures as an integral part of doing business. This effort has to be undertaken with a great amount of respect and appreciation for others’ viewpoints.

An organization’s philosophy of business can determine the fundamental purpose of a company and will be reflected in their business ethics. Actions that are in accordance with either personal ethics or business ethics may often be at odds with the other side of the spectrum. Harmony should exist between the two conflicting sides for a better work-life balance.

The old days of considering ethics and business as an oxymoron run counter to modern day thinking. Business owners have realized that principles of moral ethics, when injected into their operations, yield tangible benefits. They recognize the power of conducting business in socially responsible ways leads to increases in profits and customer satisfaction and decreases employee turnover. Demand for higher standards are growing, and individuals, along with their companies and other professionals, are being held accountable for their actions. Therefore, the matter of business ethics can become a fruitful venture for those who are willing to take the time to incorporate ethical practices with care and patience.

Walt Fegley’s insight into this important subject will include discussion of these topics:

- Times have changed or have they?
- Personal Code of Behavior vs. Business Code of Behavior
- Does your firm have a Code of Ethics?
- Is that Code part of your Mission Statement, your values or beliefs?
- Relationships between the economy and ethics, your rank and ethics?
Does the perspective change for Owners, General Contractors, Subcontractors?
- Case studies for group conversations
 - Bid Process
 - Preparing and Presenting the Estimate
 - Award Process and Contract Negotiations
 - Operations including Change Orders, Schedules, Payment
 - Close Out Procedures
- How does ethical behavior affect your company?
- Profits, Reputation, Insurance Premiums
- What do we want our companies to look like and how do we implement those practices to become successful?

As mentioned, John Wayne Heusner CPE will give our in-house talk about “Best & Final Pricing” and its impact on adherence to one’s Code of Ethics.

Riverwalk Golf Course will again serve as the site for our March dinner meeting. The facility is located at 1150 Fashion Valley Road (take Hotel Circle North or Friars Road to Fashion Valley Road, and then turn onto Riverwalk Drive to the clubhouse).

[\(cont'd on pg 1\)](#)

Are "Best and Final" Solicitations Ethical?

by John Wayne Heusner, CPE

ASPE San Diego Chapter #4 – Director and Education Chair



John Heusner CPE

When this question was posed to a group of fellow estimators, 40% said "no," 40% said "it depends," and 20% said "yes." Our American Society of Professional Estimators (ASPE) Code of Ethics states in Canon #5 "Professional estimators shall---establish guidelines for setting forth prices and receiving quotations which are fair and equitable to all parties; in Canon #7, "Professional estimators shall not engage in "bid peddling;" in Canon #8, "---shall not enter into any agreement that may be considered acts of collusion or conspiracy (bid rigging) with the implied purpose of defrauding clients."

The ASPE Code of Ethics Canon # 5 states, Professional estimators--- "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 unfair and is in direct violation of this Code of Ethics."

2. "By not padding or inflating quoted bid prices."

On the one hand, if a professional estimator knows or suspects there will be a Best and Final Offer (BAFO) request, he has a fiduciary obligation to include money in the estimate for BAFO but has an ethical responsibility to refrain from "Padding or inflating quoted bids" by our Code of Ethics.

BAFO, if done incorrectly, can quickly devolve into Bid Shopping. If we request a BAFO and violate any of the other constraints such as revealing the other bidders' prices or providing a range or stating a value that will allow the bidder to "get the job," then we quickly become guilty of Bid Shopping.

The ASPE Code of Ethics Canon #8 paragraph #4 states, "This canon does not consider the practice of 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."

Many clients expect and even measure contractors' success rate at Best and Final (BAFO) negotiations by requiring contractors to report the savings generated through best and final negotiations.

Some contractors deliberately bid projects at cost, and if they get the job then generate their profit through BAFO.

Some guidelines for conducting ethical BAFO negotiations are:

1. Don't use BAFO to get into budget. If the bids come in over budget, then the proper methodology to get into budget is to reduce the scope of the project and / or solicit value engineering proposals from the low bidders.
2. Don't use BAFO as a tool to manipulate the bids to achieve the selection of a preferred bidder. An example would be to invite one of the bidders who was not low at bid time to lower his bid and give him a range that he

[*\(cont'd on pg 5\)*](#)

needs to reduce his number to "get the job" because you prefer his team. Superior qualifications other than price that make a bidder the "preferred bidder" may be revealed in the bid process. If so, then helping them "get low" is unethical. If a properly requested BAFO does not get the preferred bidder to the lowest number, then he should be awarded the contract for his BAFO even though it is not low or the award should go to the low bidder. Both are options available to buyer.


3. Do make your intentions to perform BAFO a part of the bid instructions unless the client specifically prohibits it. This idea is sometimes opposed by procurement departments.
4. Don't share a bidder's price with other bidders.
5. Do request BAFO of all bidders.
6. Be careful about what you say when requesting BAFO so you don't get caught up in bid shopping, bid peddling or bid rigging.
 - a. Don't ask, "Can you beat this number?"
 - b. Do say, "Give us your BAFO."

When asked how frequently BAFO is requested, the estimators that were polled unanimously stated it is "very common" and some said it occurs on most projects so it is a current reality of our profession.

So, how should we respond to a BAFO?

1. We can include BAFO money in our bid so we have something to give back.
2. We can just respond that our initial bid is our BAFO.
3. We can unilaterally adjust our bid based upon where we think our competition may be.
4. We can offer cost savings alternatives.

In summary, BAFO is an accepted business practice and we must determine how to deal with it. This can be as simple as a standard response that your initial bid is your BAFO, or it can be a standard % markup that is built in to the estimate when BAFO is known or suspected to be required, or it can be handled on a case-by-case basis. Prior planning on how management plans to address BAFO requests will provide a straightforward method of dealing with BAFO's at bid time. ■



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The American Society of Professional Estimators

Chapter Four Scholarship Committee Announcement

by Daniel Luckhardt, CPE

On behalf of The American Society of Professional Estimators Scholarship Committee, I am pleased to announce the acceptance period for the '2016 Scholarship Application.' Our mission statement is as follows:

Mission Statement: *"The American Society of Professional Estimators serves construction estimators, by providing education, fellowship and opportunity for professional development."*

Our Vision: *"In its educational pursuits, ASPE strives to be the recognized leader in providing quality programs to benefit the cost estimating profession and the construction industry."*

San Diego Chapter #4's Scholarship Awards are designed to promote student involvement in chapter affairs, and to reward deserving students who exhibit a sincere interest in education and the construction industry, as demonstrated by their work experience and personal statements.

As ASPE members and individuals affiliated with our profession, it is my hope we raise the bar this year and simply get the word out to qualified candidates. Please take the time to reach out to professionals in our industry. These individuals may be working professionals or full time students currently enrolled within an educational institution with aspirations of working within the construction industry. Please refer to the Scholarship 'Eligibility' requirements within the Scholarship Application, and or feel free to contact Daniel Luckhardt, Scholarship Committee Chairman, by e-mail or phone.

Recommendations to applicants:

- ✓ Submission deadline: Friday, May 20, 2016. Please refer to the application instructions.
- ✓ Eligibility requirements: Please review the requirements and feel free to ask questions early in the application preparation process.
- ✓ Application: Please allow time in your schedule to solicit letters of recommendations.

As part of our monthly newsletter you will find the 'Eligibility, Requirements, and the Application' [attached](#) in a PDF format. Again, on behalf of the Scholarship Committee we look forward to receiving and reviewing applications for Scholarship Award considerations. Good Luck!

Daniel Luckhardt, CPE

BN Builders

Scholarship Award Committee Chairman

daniel.luckhardt@bnbuilders.com

619.633.8925

Getting Social with ASPE

by Steven E. Schraibman, AIA, CPE, CASp

ASPE San Diego Chapter #4 – Director and Public Relations Chair



Steve Schraibman CPE

I'm writing this piece to give us all a backdrop into how we can get cost estimating onto the social media map but also so that we can all find new ways to get young professionals excited about cost estimating and what it has to offer. Here are some tips to modernize our outlook on networking, how social media works, and what it has to offer us.

Being a Resource

Social media is an easy way for your audience to learn about your company. You don't have to have the most likes or have a thousand people following you. Let's be honest ... No matter how many of us love cost estimating, teens and young professionals aren't going to be ogling over what we do like a Pamela Anderson poster did to teen boys during the early 90's. That doesn't, however, mean it's pointless to have a page. Having

a landing page provides an island for young scholars to find and dock their rafts after being lost in the sea of subjects and professions offered in today's schools and businesses. It's a resource for them to find their way and see if cost estimating is right for them. Without these kinds of pages, they may stray to another profession, never realizing that cost estimating may have been right for them. As I mentioned before, you don't have to have 1000 follows to have a social media platform of worth; you need to have followers of worth. These are people that are genuinely interested in learning and expanding their visions into a profession.

Taught by the Student

We aren't the only ones who can teach. Just because we are all "grey, bent, and old" doesn't mean our audience and young professionals landing on our pages don't have a lot to teach us, too. Just in the way they engage or don't engage on our pages shows if we are even putting out the right content for them. This can be content like articles, interviews, and just some funny/interesting photo you can tie into cost estimating to make it interesting for them. To be honest, if you're not selling sex or showing cars, content is always going to be tricky to make it interesting, but it's not impossible. I see so many sites posting boring things that have no engagement whatsoever. That's not to say these pages aren't trying hard enough or that they don't care, and it's just some teen in pigtails that's more concerned with what she's being paid for her social media skills than what she posts. We need to be asking our future cost estimators questions and asking about their opinions on our social media platforms.

The Proof is in the Social Media

There are so many benefits to using social media as a marketing and information-providing tool. One big thing is that it's pretty much free. You can go on Twitter, Facebook, Instagram—you name it—and start creating engaging content today. In addition, social media has given us the ability to not only cast a wider net into this "ocean of future cost estimators," it allows us to target the right ones of importance. Social media gives us the chance now to form and nurture relationships of young professionals and network with the old.

Social media seems unknown and intimidating, but it really is meant to be the opposite. It was created to provide a platform for millions of people to interact and learn from across the world instantly. Not every platform is right for cost estimating in general, but it finally can provide a place for us to get new young people excited about more than just seeing how expensive it is to replace drywall but rather excited to see the world as we do. To shape their minds into being problem solving, cost estimating maestros. ■

Meet the Members of Your Chapter Board ... Focus on DAVID LUHM, E Chief Plumbing Estimator—Alpha Mechanical Inc.



David Luhm, E

David Luhm has been fortunate enough to be a part of the Plumbing and Mechanical contracting world for 38 years, serving and completing a 5-year apprenticeship, earning him multiple licenses and accreditations, shortly thereafter moving into Project Management and then on to Estimating. David's many years of experience have allowed him to be involved in very diversified, interesting, and exciting variations of projects that range from the Multi-Family Residential side (condominiums, townhomes, apartments and dormitories), to the Industrial side (paper mills, oil refineries, taconite facilities, oil/gas pipelines, acid plants, waste water treatment facilities, EPA labs and aircraft manufacturing facilities). From the Healthcare side (hospitals, medical clinics, dental clinics, elderly-assisted living facilities), to the Commercial side (city, county and airport vehicle maintenance facilities, detention facilities—federal, state and private, courthouses/district heating and cooling infrastructure and systems and office buildings, education and higher education facilities—K-12/Junior colleges and state colleges), to Military (Air National Guard, Armory and Marine bases).

David has been a proud member of the ASPE San Diego Chapter #4 since 2012. He joined while he was the Senior Estimator for California Comfort Systems, providing estimates for hard bids as well as budget/design build estimates. He is currently employed as a Senior Project Manager for Alpha Mechanical Inc. and currently manages projects at the new MV22 Double Hangar at Camp Pendleton; a center for the arts at Chapman College in Orange, CA; Blue Sky, a new residential high-rise in downtown San Diego; the new multi-use Idea 1 design build project also in downtown San Diego; as well as a large TI project at General Atomics in Poway. He has also accepted a new role with Alpha Mechanical as the Chief Plumbing Estimator and team leader in charge of implementing new estimating software programs.

David is a resident of the Coachella Valley (Palms Springs/Indio area) where he lives with his wife Maureen, a holistic dog groomer, where they both spend their free time enjoying the beautiful desert and all it has to offer and some great meals created by (Chef) David. David has two sons, Ryan and Tanner (Wisconsin/Minnesota), as well as two stepsons, Cory and Dana (North Carolina). ■

March Program Notes

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

Registration and Social Networking starts at 5:00 PM, with the Pledge of Allegiance, Introductions, and Announcements occurring at 5:45 PM. Dinner service will commence at 6:15 PM, with the program to follow. Attendees will have their choice of Tri-Tip Beef, Salmon, or a Vegetarian Dish. The cost of the dinner will be \$40.00 per person and \$25.00 per student.

[Click here](#) to make your reservation through  ... or go to <http://evite.me/TW9k6YWKNu>.

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

Frank E. Young, FCPE

ASPE San Diego Chapter #4

Programs Committee Chair



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FOR MORE INFORMATION:

Contact **LAURA PARKER, CPE**
619.704.2914 (ofc); 619.977.2817 (cell)
OR lauraparkercpe@gmail.com



ASPE MISSION STATEMENT

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

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

ASPE Membership

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

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

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

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

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

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

frednagel@gmail.com 619.647.1304

ASPE San Diego Chapter #4

CALENDAR OF EVENTS



◆ **Tuesday, March 1, 2016 (5:30-7:30 PM)**

ASPE San Diego Board of Directors' Meeting

Location: Offices of Alpha Mechanical
4885 Greencraig Lane, San Diego

◆ **Tuesday, March 15, 2016 (5:00 PM Registration)**

ASPE San Diego Monthly Dinner Meeting

Program: Ethics Program ...
"Our Ethical Code—But This Is Business!"

Principal Walt Fegley, President & CEO

Speaker: Reno Contracting, Inc.

In-House John Wayne Heusner, CPE

Talk: CRB Builders

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

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

ASPE San Diego Board of Directors' Meeting

Location: To Be Determined

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

ASPE Southwest Regional Meeting

Location: Albuquerque, NM
(Location to be determined)

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

ASPE San Diego Monthly Dinner Meeting

Program: Site Tour of Airborne San Diego
Indoor Skydiving Facility
Southeast corner of 14th Street and
Imperial Avenue, downtown San Diego

Host(s) Representatives from
& **Dinner** Swinerton Builders

Meeting

Speaker(s):

Location: The Old Spaghetti Factory
275 Fifth Avenue, San Diego
(Gaslamp District)

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

ASPE San Diego Board of Directors' Meeting

Location: To be determined

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

ASPE San Diego Educational Program:

BID DATE SIMULATION

Lunch: 12:00-1:00 PM

Facilitator: Paul Martin, Herrero Contractors

Instructions: 1:00-1:30 PM

Bid Day 1:30-4:00 PM

Simulation

Program:

Bid Opening 4:00-4:30 PM

& Critique:

Location: To be determined

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

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Paul Chang, E

2015-2016 Chapter Officers

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American Society of Professional Estimators

San Diego Chapter 4
CALIFORNIA



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American Society of Professional Estimators

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Register Today!

For the Tuesday, March 15, 2016
ASPE San Diego Chapter Dinner Meeting ...

**OUR ETHICAL CODE —
BUT THIS IS BUSINESS!**

CONTACT US

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**American Society of Professional Estimators
San Diego Chapter #4**

**2016
UNDERGRADUATE COURSES
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**Eligibility, Requirements, Awards
and Application**

Submission Deadline:

Applications and Reference Letters must be mailed to:
The ASPE San Diego Chapter #4 Scholarship Committee
and postmarked on or before Friday, **May 20, 2016**

Mail to:

ASPE San Diego Chapter #4 Scholarship Committee
c/o Dan Luckhardt CPE or Frank E. Young FCPE
BN Builders
9255 Towne Centre Drive, Suite 800
San Diego, California 92121

If you have questions, please contact:

ASPE San Diego Chapter #4 Scholarship Committee
Daniel Luckhardt
daniel.luckhardt@bnbuilders.com or (619) 633.8925



Mission Statement: “The American Society of Professional Estimators serves construction estimators, by providing education, fellowship and opportunity for professional development.”

Our Vision: “In its educational pursuits, ASPE strives to be the recognized leader in providing quality programs to benefit the cost estimating profession and the construction industry.”

San Diego Chapter #4’s Scholarship Awards are designed to promote student involvement in chapter affairs, and to reward deserving students who exhibit a sincere interest in education and the construction industry, as demonstrated by their work experience and personal statements.

ELIGIBILITY

1. Applicant may be currently taking undergraduate accredited courses.
2. Applicant must be employed in the construction industry, preferably working for an ASPE Member-Firm.

REQUIREMENTS

1. Applications must be submitted in hardcopy/original format.
2. Applicant is responsible for ensuring that all items listed below are included in the submittal package and postmarked on or before **May 20, 2016**.
 - a) Completed and signed application.
 - b) Personal statement.
 - c) Letters of recommendation.
3. Applicant must be able to attend ASPE San Diego Chapter #4’s Awards Dinner on Tuesday, July 19, 2016 between the hours of 5:30 p.m. and 8:30 p.m. at a location to be determined in general San Diego area.

AWARDS

1. A scholarship in the amount of \$500.00* will be awarded.
2. Applications will be reviewed by the ASPE San Diego Chapter #4 Scholarship Committee. Attention and consideration will be given to work experience; applicant’s expressed interest in furthering his/her education, goals in the construction industry, and references.
3. Designees will be notified by June 3, 2016.
4. Award will be made and check distributed during the Awards Dinner.



Non Discrimination Clause:

The American Society of Professional Estimators is an Equal Opportunity Organization and encourages applications from all individuals.

*The amount of the scholarship is subject to change.



2016 SCHOLARSHIP APPLICATION

Please limit application form to 3 pages and restrict your personal statement to 2 pages.

PERSONAL INFORMATION

Name _____

Address _____

City, State, Zip _____

Telephone _____ E-Mail _____

I would like to be contacted about internship opportunities with ASPE Member-Firms.

SCHOLASTIC INFORMATION

List of ASPE Online Courses already taken by applicant:

Previous College or University education:

City, State: _____

Area of concentration: _____

Degree anticipated: _____

ASPE San Diego Chapter #4

2016 SCHOLARSHIP APPLICATION

Professional or School Affiliations (List participation in any school, professional or community activities including offices held and awards received):

EMPLOYMENT HISTORY

Work Experience (List full-time, part-time, co-op and summer employment. Briefly describe duties and responsibilities.):

RECOMMENDATION

Letters of recommendation from ASPE member or job supervisor with personal knowledge of the applicant must accompany the application (maximum 2 letters).

PERSONAL STATEMENT

A statement about your career goals and why you think you should receive the scholarship award. Include information about:

- your career objectives
- how you and the construction industry can benefit each other
- your most important extracurricular activity

Statement should not exceed 500 words or (2) pages. Please attach to application form.

I agree that the application and all attachments may be used for the purposes of evaluation and selection by the ASPE San Diego Chapter #4 Scholarship Committee.

Signature: _____ Date: _____

APPLICANT: You have the responsibility to ensure that the application, all forms, letters are postmarked on or before **May 20, 2016** and received by the ASPE San Diego Chapter #4 Scholarship Committee.

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