

S.D. Mator

Published by ASPE San Diego Chapter #4

October 2016

Volume 15, Issue 2

MEETING AT A GLANCE

DATE: TUESDAY, OCTOBER 18, 2016

TIME: 5:00 PM—Site Tour Registration

5:30 PM—Site Tour Begins

6:30 PM—Registration at Karl Strauss for those not attending Site Tour

7:00 PM—Dinner on Karl Strauss' covered patio (Garden Room)

Announcements will be made during dinner. Short Q&A period about the project will follow.

PROGRAM:

OKTOBERFEST & UCSD HEALTH SCIENCES BIOMEDICAL RESEARCH FACILITY

SITE TOUR HOSTS:

Mark Rowland - Principal Architect & Project Mgr
UCSD Facilities Design & Construction

Steve Miller - MEPF Manager
McCarthy Building Companies

SITE TOUR LOCATION:

UCSD Campus

Osler Lane East of Gilman Drive, La Jolla

Map showing location of building is [attached](#).

DINNER LOCATION:

Karl Strauss Brewery Gardens

9675 Scranton Road, San Diego

(Sorrento Mesa, just east of I-805 & north of Mira Mesa Blvd)

COST: Members & Guests - \$30 per person

Students - \$25

SITE TOUR ONLY - \$10 per person

Cancellations must be received by NOON on Monday, October 17th or no shows will be billed accordingly.

RSVP: <http://evite.me/m2hh7zfVbn>

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

Oktoberfest & UCSD Health Sciences Biomedical Research Facility

San Diego Chapter #4 usually arranges Site Tours to visit jobs under construction. For the month of October 2016, we will have an opportunity to inspect a completed project. Although the proposed return to see UCSD's Jacobs Medical Center could not take place due to licensing and last-minute activities in that building prior to opening, **Mark Rowland**, Principal Architect and Project Manager with UCSD Facilities, Design & Construction, offered to host our group for a comprehensive look at the recently finished Biomedical Research Facility (BRF2). He will be joined by **Steve Miller**, MEPF Manager with McCarthy Building Companies, Inc., the general contractor on the project. Our industry does not often enjoy the privilege of viewing a fully-outfitted laboratory complex.

Established in 1864, **McCarthy** prides itself on a long history of building facilities that drive greater value for their clients, from exceptional quality and safety to ease of maintenance over time. Their company ranks as one of the top ten ENR domestic general contractors headquartered in St. Louis, MO, and is 100% employee-

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

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Greetings!

As I am writing this month's message, I am sitting in the Minneapolis Airport on my way back from the Joint NW/SW Fall Regional Meeting held in Oklahoma City. This was one of the best Regionals I have attended. Most of the Chapters throughout the two regions were represented. Our hosts, Landrun-Oklahoma City - Chapter 45, were absolutely fantastic.

Friday was a day of educational programs which included four topics. Friday evening, we had dinner at a local restaurant followed by a program presented by Rand Elliott, a local award-winning architect who was instrumental in various key projects in and around Oklahoma City. On Saturday, we had three additional educational programs followed by the Regional Meeting. We had Doyle Phillips FCPE, immediate past National President, give us an update on all the changes that were passed at this year's Annual Meeting.

Our September meeting was a tour of Sundt Construction's office in Mission Valley followed by Dinner (catered by Phil's BBQ) and a presentation by Sundt's Preconstruction Department on their Technology Capabilities and various Work Opportunities with them. We would like to thank Sundt for their efforts in making this a successful and informative meeting.

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.

Membership Status:

As of the most recent Chapter Roster issued in October 2016 by SBO (Society Business Office), our membership is at 54 members. Currently, we have 23 members who are CPE's and two FCPE's.

As a reminder to all members, if you have changed jobs, are in-between jobs, retired or have had to relocate, please update your status/contact information online at www.aspenational.org. Remember, to log in, your User ID is your membership number, and your default password is your email address. You can also contact your Chapter Membership Chairman for assistance at michael.moyers@bestinteriors.net.

New Members:

This month we would like to welcome our newest member, **Ryan Wohlfarth**, of Uponor.

Dues Renewal:

We have now passed through the 2016-2017 year dues renewal period. For those of you who have not renewed and are planning on it, you can still renew your valuable membership. Please contact SBO at (615) 316-9200.

Upcoming Events:

Please come and join us at our upcoming October Meeting. We will be touring the **UCSD HEALTH SCIENCES BIOMEDICAL RESEARCH FACILITY FOLLOWED BY DINNER AT KARL STRAUSS BREWERY GARDENS**. Please be sure to read the [Program Article](#) in this issue by Frank Young.

Other events to keep an eye out for are:

- A. Our November meeting we will be having Jeff and John Gerardi of ProEst Software. The meeting date will be November 15, 2016 and will be held at Riverwalk Golf Club.
- B. Our annual December Breakfast meeting will be Friday, December 16, 2016, and we will again have Alan Nevin with the Xpera Group.

Michael D. Moyers, CPE

President, ASPE San Diego Chapter #4



Michael Moyers, CPE

October Program Notes

[cont'd from pg 1](#)

owned. The 196,000 SF of research and support space for UCSD Health Sciences on a 3.3-acre site was designed by Zimmer Gunsul Frasca (ZGF) Architects from Portland, OR, at a total cost of \$180 Million (\$120 Million in construction).

BRF2 creates an infrastructure that fuels multidisciplinary research and an environment that fosters new ideas at the earliest stages of translational medicine. Collaboration between scientists and other local partners can access their research and share critical data, and enhance their ability to attract the best and brightest people in the field to bring their talents to the UCSD campus. It will accommodate new and expanded platforms, including bioinformatics, genomic medicine, gastrointestinal medicine, childhood diseases, pathology, immunology, inflammation, psychiatry, cardiology, neurosciences, infectious diseases, and glycobiology.



The project achieved a coveted Platinum LEED certification, leveraging San Diego's natural elements of abundant sunlight and cool ocean breezes. The designation emphasizes measurable and sustainable green technologies, such as water and energy efficiencies, indoor air quality, use of building materials with low VOC emissions and significant recycled content from available local sources, and other innovations in building performance. Radiant heating systems, operable windows, and individual thermostats in the office space allow occupants to control their own climate. Lighting systems provide photo-sensor controlled dimming of indirect interior fixtures to limit energy use only when and where needed by the tenants. The water reclamation systems will collect almost 900,000 gallons per year from air handler condensate minimizing the need for potable water for landscaping irrigation and toilets, while bio swales capture and filter stormwater runoff.

The exterior incorporates a combination of architectural concrete, curtain wall, painted aluminum panels and terra cotta cladding. The facility contains five floors of wet bench laboratories, open lab space, and lab support space and seven stories of administrative office space, interaction spaces, and conference rooms. Upon entering the building, site tour attendees will be met by an inspiring, open interaction space that showcases a dramatic concrete staircase encased with frosted glass panels and LED-lighted handrails. The balconies are enclosed with rift-sawn oak wood paneling and guardrails.

Granite tile and chestnut planks adorn the lobby floors. Two outdoor seating areas are located off of the 2nd and 4th levels of the office portion, featuring slotted, metal overhead trellises and teak ceilings. Perhaps the most notable design feature of the building is the dynamic, computer-controlled exterior solar shading system on the east, south and west facades. The shading system reduces visual glare, cooling load and energy use, while the radius ceiling shape helps redirect sunlight to facilitate optimum daylighting. UCSD will be studying how capturing natural light in this unique manner can enhance employee performance and satisfaction with their workstations. A full-height mezzanine above the basement core lab areas supports the MEP systems for that lab space. The location of the

[cont'd on pg 4](#)

mezzanine will allow maintenance and repair work to be performed without disturbing the research activities below. This element within the structure represented the most challenging technical aspect of the project. Building Information Modeling (BIM) was used extensively to help coordinate these spaces, while Bluebeam software assisted in the electrical layouts.

JOIN MARK ROWLAND AND STEVE MILLER ON TUESDAY, OCTOBER 18th TO TOUR THE BIOMEDICAL RESEARCH FACILITY. SEE [ATTACHED MAP](#) FOR LOCATION OF THE BRF2 ON OSLER LANE EAST OF GILMAN DRIVE IN LA JOLLA. PERSONAL PROTECTIVE EQUIPMENT IS NOT REQUIRED.

Site Tour Schedule:

Registration at Building Entrance – 5:00 PM
Start of Site Tour – 5:30 PM

Following Site Tour, attendees will adjourn to Karl Strauss Brewery Gardens' Covered Patio (Garden Room) in Sorrento Valley for dinner.

Dinner Meeting Schedule:

Registration for those not participating in Site Tour at Karl Strauss Brewery Gardens' Covered Patio (Garden Room) – 6:30 PM
Announcements – 7:00 PM
Dinner Service – 7:15 PM
*Choice of Big Beef Burger, Mesquite Chicken Sandwich, Chopped Cashew Chicken Salad, or Tabouli & Melon Salad (Vegetarian)
Short Project Presentation – 8:00 PM

Location of Karl Strauss Brewery Gardens: 9675 Scranton Road, San Diego (Sorrento Valley); east of I-805 and north of Mira Mesa Boulevard.

Cost:

SITE TOUR ONLY – \$10.00
Site Tour and Dinner Meeting – \$30.00
Students – \$25.00

[Click here](#) to make your reservation through  ... or go <http://evite.me/m2hh7zfVbn>

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

Telephone: (619) 321-4822

Email: aspechapter4@outlook.com

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

JOB OPPORTUNITY

W.E. O'Neil Construction Co. is hiring an experienced Estimator in our San Diego office. The successful candidate will take a lead role in pre-construction negotiation, budgeting and estimating. This position combines both office and field work, interaction with clients, architects, consultants and subcontractors.

Requirements & Responsibilities

- Highly prefer experience of commercial construction projects including retail, industrial, office, and hospitality projects
- Perform quantity estimates
- Lump sum bids
- Conceptual estimates based on schematic drawings
- Prepare bid schedules and construction contract documents
- Coordinate preconstruction activities

Email your resume or questions to:

Alan Fluhrer – Manager, Talent Acquisition
fluhrer@weoneil.com

Note: If you are not ready to move right now and would like to keep in touch, send me an email or connect with my on LinkedIn.

Todd Caha, CPE
Senior Estimating Manager



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FOR MORE INFORMATION:

Contact **FRANK YOUNG, FCPE**
619.980.4025 (cell) or
pancho77@cox.net



ASPE MISSION STATEMENT

The American Society of Professional Estimators
is dedicated to the promotion of
the profession of estimating and to
the benefit of the construction industry.

[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 known as "CPE." CPE status is recognized by Builders, Government Agencies, Developers, and many other Corporate entities as the highest level of qualification as an estimator. Educational training is available to become part of this elite group of professionals.

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

If you would like to become part of this exciting group of professionals, please contact Michael Moyers CPE at 858.737.7316 (office) or 619.843.6962 (cell) or:

michael.moyers@bestinteriors.net

ASPE San Diego Chapter #4 CALENDAR OF EVENTS



- ◆ **Tuesday, October 4, 2016 (5:30-7:30 PM)**
ASPE San Diego Board of Directors' Meeting
Location: Kaiser Facilities Office

- ◆ **Friday, October 7, 2016—Saturday, October 8, 2016**
ASPE Southwest/Northwest Regional Meeting
Location: Hampton Inn
Oklahoma City, Oklahoma

- ◆ **Tuesday, October 18, 2016 (5:00 PM Registration)**
ASPE San Diego Monthly Dinner Meeting
Program: Site Tour and Dinner Meeting
Presentation for UCSD Health Services
Biomedical Research Facility
Site Tour Hosts: **Mark Rowland**, Principal Architect
and Project Manager with UCSD
Facilities Design & Construction
Steve Miller, MEPF Manager with
McCarthy Building Companies
Site Tour Location: UCSD School of Medicine Campus
Osler Lane East of Gilman Drive
La Jolla
Map showing location of building is [attached](#).
Dinner Venue: Karl Strauss Brewery Gardens
9675 Scranton Road, San Diego
(Sorrento Valley north of Mira Mesa Blvd)

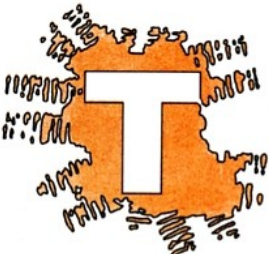
- ◆ **Thursday, October 20, 2016 (12:00-6:00 PM)**
Blue Book Network Showcase
Location: Petco Park
100 Park Boulevard, San Diego
(East Village, Downtown)

- ◆ **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
Speakers: Jeff and John Gerardi
In-House Speaker: To be determined
Location: Riverwalk Golf Club
1150 Fashion Valley Road, San Diego

- ◆ **Tuesday, November 22, 2016 (5:30-7:30 PM)**
ASPE San Diego Board of Directors' Meeting
Location: To be determined

- ◆ **Friday, December 16, 2016 (7:00 AM Registration)**
Joint ASPE/CSI SD Christmas Breakfast Meeting
Program: Real Estate and Construction
Economic Forecast for 2017
Speaker: Alan Nevin, Xpera Group
Location: Admiral Baker Golf Course Clubhouse
2400 Admiral Baker Road, San Diego



Tim Lackey
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Frank Young, FCPE

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Paul Chang, E

2016-2017 Chapter Officers

Office	Officer	Phone	Fax	Email
President	Michael Moyers, CPE Best Interiors, Inc.	858.737.7316 619.843.6962-C	858.737.7317	michael.moyers@bestinteriors.net
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Immediate Past President	Frank E. Young, FCPE CSOS Consulting	619.440.5517 619.980.4025-C	619.401.7545	pancho77@cox.net
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2016-2017 Chapter Board of Directors

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John Balistreri, CPE Kaiser Permanente	619.589.3080 619.861.1131-C	619.589.3192	john.t.balistreri@kp.org
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OF PROFESSIONAL
ESTIMATORS



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Website: <http://www.aspenational.org>

Register Today!

For the Tuesday, October 18, 2016
ASPE San Diego Chapter Meeting ...

**OKTOBERFEST &
UCSD HEALTH SCIENCES
BIOMEDICAL RESEARCH FACILITY**

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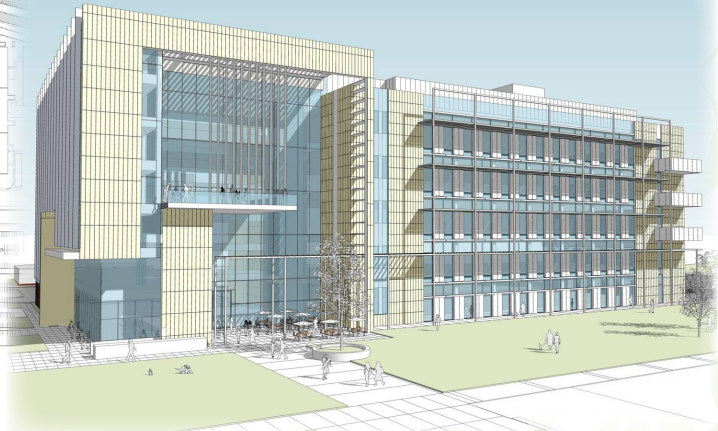
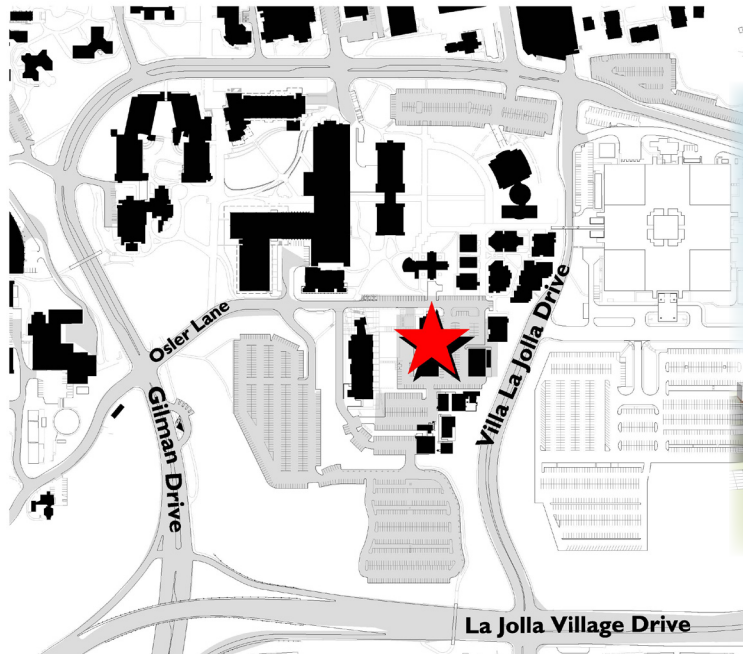
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HEALTH SCIENCES BIOMEDICAL RESEARCH FACILITY PHASE II

UC San Diego

JANUARY 2013



Location Map

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.

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