



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



S.D. Mator



September 2015

Volume 14, Issue 2

SITE TOUR: Otay Border Crossing / Otay Border Xpress ... "It's Otay to Cross Now"

DATE: TUESDAY, SEPTEMBER 22, 2015
TIME: **5:15 PM**—Site Tour Registration
5:45 PM—Site Tour Begins
6:30 PM—Dinner Registration
For those not attending the Site Tour
6:45 PM—Dinner Service Begins
Pledge of Allegiance, Introductions,
Announcements while enjoying our meal
7:30 PM—Short Dinner Meeting
Presentation

PROGRAM:
**SITE TOUR & DINNER PRESENTATION
FOR OTAY BORDER CROSSING /
OTAY BORDER XPRESS**

SITE TOUR/DINNER LOCATION:
[Click here](#) for Directions to the Jobsite.
Parking is available around jobsite trailers.
Call (213) 500-7113 if you become lost.
BUFFET DINNER SERVED AT THE JOBSITE
PREPARED BY EL INDIO CATERING.

SITE TOUR HOSTS/PRESENTERS:
Turner Construction Co.
Viry Martino—Project Engineer
Dave McConkey—Senior Superintendent
Meredith Stumpo—Senior Estimator

COST: **\$40 per person**
\$25 for full-time students
\$15 for site tour only

*Cancellations must be received by NOON on Monday,
September 21st or no shows will be billed accordingly.*

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

RSVP: Paul Chang, E
Sundt Construction
619.321.4822 or pmchang@sundt.com

Meeting at a Glance



September Program Notes:

It's Otay to Cross Now

I was born and raised in San Diego as was my mother. She grew up in San Ysidro and lived in a house on the hill overlooking the San Ysidro Border Station which remains to this day. Her father ran a General Store and her aunts and uncles had similar business in the area. Back in the middle part of the last century, a visit to Tijuana was entirely different than experiencing the trials and tribulations of crossing the U.S./Mexican line today. Over the years, I can't recall using the Tijuana International Airport on more than 2 or 3 occasions, flying into resort cities on the Gulf of California for vacation time or fishing trips.

In reading up on the new Otay Border Crossing Project to connect the U.S. side with the Tijuana International Airport through a double-corridor 390-foot pedestrian bridge, it was interesting to learn that 2.4 million passengers cross into Mexico annually to depart from Rodriquez Airport to cities in Mexico, with even non-stop

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Greetings!

Since we had to cancel our August meeting, there is no report.

At our last Board meeting/planning session, we made the following changes to our Organizational Chart for the 2015-2016 year:

- Membership Committee Chair – Fred Nagel, CPE
- Certification Committee Chair – John Balistreri, CPE
- Phone Committee Chair – Paul Chang
- Standards Committee Chair – Fred Nagel, CPE
- Education Committee Chair – Frank Young, FCPE/John Heusner, CPE
- Mentoring Committee Chair – Frank Young, FCPE
- Programs Committee Chair – Frank Young, FCPE
- Communications Committee Chair – John Balistreri, CPE
- Finance Committee Chair – Michael Moyers, CPE
- Newsletter Committee Chair – John Balistreri, CPE
- Ways and Means Committee Chair – David Luhm
- Public Relations Committee Chair – Steve Schraibman, CPE
- Scholarship Committee Chair – Dan Luckhardt, CPE



Michael Moyers, CPE

We also discussed the upcoming SW/NW Fall Regional Meeting to be held in Seattle. It was decided that our representatives will be me and Steve Schraibman. The meeting will be held October 2nd and 3rd.

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.

Membership Status: As of the most recent Chapter Roster issued September 2015 by SBO (Society Business Office), our membership has decreased to 52 members. That equates to a loss of 13 members who did not renew this year. Currently we have 18 members who are CPEs and one FCPE. As a reminder to all members, if you have changed jobs, are in-between jobs, retired or have had to relocate, please update your status/contact information online at www.aspenational.org. Remember, to log in, your User ID is your membership number, and your default password is your email address. You can also contact your Chapter Membership Chairman for assistance at frednagel@gmail.com.

New Members: We do not have any new members to report this month.

Dues Renewal: We have now passed through the 2015-2016 year dues renewal period. At the beginning of the cycle, we had a total of 65 members; as of September 5th, we are down to 52 members. 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.

As a reminder, the Dues Renewal Process is as follows:

1. Membership Invoices are now sent via email and you should have already received it. If not, please let me know so I can verify your email address with what is on record with SBO.
2. You can pay your dues online through the ASPE National website (www.aspenational.org). Just click on the membership tab and you will see the Blue Renew Button. Click there and you are on your way to renewing. Before starting the renewal process you will need your (User ID) and (Password).
3. If you need help, contact SBO at (615) 316-9200.

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

flights to Tokyo, Japan and Shanghai, China. I can recall that official border crossings consisted of the main complex at San Ysidro for vehicles and pedestrians, an adjacent facility for trucks, and a seldom-used gate at Imperial Beach open for limited hours. We now suffer the congestion problems associated with utilizing only two Border Stations at San Ysidro and Otay Mesa, and many commercial businesses have chosen to travel the additional miles to cross at Tecate off of Highway 94. Plans have been announced to construct another Border Station east of the present Otay Mesa location.



Businesses in both Otay Mesa and Tijuana are hopeful that the Otay-Tijuana Cross Border Facility will generate more passenger usage and economic trade for the area. Ticketed passengers departing from Tijuana will pay a toll to cross from the U.S. side into Mexico, and similarly when returning back to this country. After canvassing several Member-Firms about hosting this month's Site Tour, Turner Construction Co. stepped up to the plate and offered to show us this project. Their scope includes the 60,300 SF two-story steel structure that will act as the point of entry/exit in the U.S. as well as the U.S. portion of the pedestrian walkway including the concrete support foundations. The building will house in-bound and out-bound Customs booths, meeting areas, maintenance areas, check-in areas, shops and restaurants. It will also contain space for the U.S. Customs and Border Protection operations, with violator processing and enforcement zones. Adjacent site improvements offer both short-term and long-term parking. The architect for the \$33,000,000 project is Stantec Architecture, Inc. out of



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

Sacramento, CA, in conjunction with the world-renowned firm of Legoretta + Legoretta, with completion anticipated next month. Program costs for the entire complex could run up to \$80 million. The venture is privately funded by both American and Mexican interests. This joint endeavor represents the first airline terminal on this continent to link two countries.

DIRECTIONS TO THE JOBSITE:

Take Highway 905 East from I-5 or I-805, Exit on Britannia Blvd and Turn Right, Turn Left at the 3rd Traffic Signal on Siempre Viva Rd, Turn Right at the 2nd Street onto Las Californias, Continue on Las Californias until Entering Jobsite.

OR

Take Highway 125 South (South Bay Freeway Toll Road) to the End, Turn Right on Otay Mesa Rd, Continue on Otay Mesa Rd and Turn Left on Britannia Blvd, Continue to Follow Directions as Indicated Above.

Parking is available around jobsite trailers; call (213) 500-7113 if you become lost.

Personal Protective Equipment (PPE) will be required: Hard Hats, Safety Glasses, Safety Vests, Hard-Toed Shoes (Tennis Shoes Allowed), and Appropriate Clothing



Viry Martino

Viry Martino, Project Engineer, and Dave McConkey, Senior Superintendent, from Turner Construction Co. will serve as guides during the Site Tour. After signing in with Security, registering with ASPE, and filling out the mandatory Insurance Waiver form starting at 5:15 PM, we will commence the Site Tour promptly at 5:45 PM. The evening's activities will open with a short introduction to the project, followed by a visit to the building to understand the "passenger experience" from the Check-in area to the Duty-Free area. We will view the Southbound and Northbound corridors, venturing onto the bridge structure, the Customs and Border Protection inspection areas and X-ray machines for processing people, the CBP back-of-house, and future retail shops and restaurant venues. Following dinner in the Conference Rooms, Viry Martino and Meredith Stumpo, Senior Estimator with Turner, will offer a short presentation to discuss the purpose of this unique facility, Pre-Construction efforts, design architect(s)' background, coordination issues with both the U.S. Customs and Border Patrol and the Mexican Government and their contractor, and other challenges encountered during the project.

El Indio Catering will supply the food and beverages for our buffet-style meal. Menu choices consist of the following dishes: Chips with salsa, guacamole, lettuce, cheddar cheese, and sour cream; Spanish Rice, Frijoles de la Olla, and Side Salad (Italian & Ranch Dressing); Cheese Enchiladas, Pork Tamales, and Beef or Chicken Taquitos; Fudge Brownies or Jumbo Cookies; Canned Sodas or Bottled Water.

Pledge of Allegiance, Self-Introductions, and Announcements will occur during dinner. The cost for this event will be \$40.00 per person and \$25.00 per student; individuals choosing to only attend the Site Tour will be charged \$15.00 for this particular outing. **TURNER CONSTRUCTION CO. has again generously agreed to be our Dinner Meeting Sponsor** to help defray costs for students joining us for this meeting.

We kick off FY 2015-16 with another informative Site Tour visit, and hope that our membership and others in the construction community will choose to participate on Tuesday, September 22nd. Contact Paul Chang with Sundt Construction to make your reservation today.

Phone: (619) 321-4822 Email: pmchang@sundt.com

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

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ASK A CPE

by **John Wayne Heusner, CPE**
Senior Estimator, CRB Builders



John Heusner CPE

This month's *Ask a CPE* editorial is entitled "How Employers Benefit from Hiring CPE's for their Estimating Departments."

As Certified Professional Estimators, we personally believe our Certification makes us better at our jobs. We ascribe to high ethical standards. We commit to not working in areas we are not qualified to work in. We have more than five years of experience, so we bring that maturity to the job. We believe we are respected among our peers. We hold each other accountable for our actions. We help each other become better. We support improvements in the profession. We strive for excellence in our work product. We lead the development of new and better tools for our trade.

Guess what? Those are not the things that employers see as of the highest value.

The highest value that Certification brings to our employers is the credibility the initials "CPE" demonstrate on our resume. When a client wants to hire a contractor or a consultant to build his new facility, he is looking at resumes for key employees in their proposals. Alphabet soup behind the key individuals' names is compelling; is the Senior Manager a CCM? is the Mechanical Engineer a PE? Is the Architect a member of AIA? Is the Estimator a CPE?

You must *get* the work in order to *do* the work! The CPE credential helps estimators and their firms achieve that goal. ■

President's Message


[*cont'd from pg 2*](#)

Upcoming Events: Please come and join us at our upcoming September meeting. We will be touring the new Otay Border Crossing, hosted by Turner Construction Co. **Our meeting this month will be on September 22nd instead of the 15th** due to scheduling conflicts. We will have a catered Mexican dinner at the Jobsite. Please be sure to read the Program Article by Frank Young in this issue, beginning on [page 1](#).

Other events to keep an eye out for are:

- A. For our October Meeting, we will be having a joint meeting with NAWIC. **The meeting will be held on Tuesday, October 13**, which is the second Tuesday in October in lieu of the third Tuesday.
- B. The Fall SWNW Regional Meeting will be held on October 2nd and 3rd in Seattle, Washington.
- C. For our November meeting, we will be having Dave Umstot P.E. with Umstot Project and Facilities Solutions. The program will be "Target Value Design and Integrated Project Delivery: What Do These Innovations Mean for Estimators?" The meeting date will be November 17th. *Dinner venue is yet to be determined.*
- D. Our annual December Christmas Breakfast meeting will be Thursday, December 18, 2015 and we will again have Alan Nevin with the Xpera Group.

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



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Tim Lackey
President

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Meet the Members of Your Chapter Board ...
Focus on JOHN BALISTRERI, CPE
Chief Estimator
NFS Capital Projects Facilities Construction, San Diego Service Area
Kaiser Construction



John Balistreri CPE

John T. Balistreri was born and raised in San Diego, CA. He started his construction experience joining the Painters Union in 1983 and served an apprenticeship with Cross Painting. In 1988 John started working for Kaiser Foundation Health Plan as a Journeyman Painter and after 5 years had changed his career from Painting to working in the Sign Shop. The opportunity to learn estimating for Kaiser Construction came up in 2001 where John became an assistant estimator. He had completed the course for a Certificate in Program Estimating, endorsed by the ASPE through SDSU College of Extended Studies in 2006. This helped advance John to become the Project Estimator for Kaiser Construction in San Diego. He has passed the Estimating Proficiency II Exam endorsed by ASPE and continued his

education with the extended studies program at SDSU and completed a Certificate in Construction Practices and Construction Supervisory – Technologies and Project Management. John became a Certified Professional Estimator with the ASPE in October 2012. After becoming a CPE, John was promoted by Kaiser to the Chief Estimator position for the San Diego Services Area. Currently he manages 2 assistant estimators, and his workload has averaged approximately 150 projects for the last 5 years totaling approx. \$24 million per year on average.

Outside of work John has been married to his wife Kelly for 26 years and they have 2 children. His son is currently working at CW Driver as a Project Engineer, and his daughter is a junior at Northern Arizona University majoring in Visual Communications with an emphasis in Graphic Design. John enjoys family vacations, and his hobbies include boating, skiing, fishing and racquetball. ■





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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 Michael Moyers CPE at:

michael.moyers@bestinteriors.net 858.737.7316



ASPE San Diego Chapter #4

CALENDAR OF EVENTS

◆ **Tuesday, September 1, 2015 — 5:30-8:30 PM**

ASPE San Diego Planning Retreat and Board of Directors' Meeting

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

◆ **Tues., September 22, 2015 — 5:15 PM Registration**

ASPE San Diego Site Tour & Monthly Dinner Meeting

Program: "It's Otay to Cross Now"
Site Tour and Dinner Meeting Presentation for the New Otay Border Crossing to the Tijuana Airport

SITE TOUR BEGINS PROMPTLY AT 5:45 PM

SHORT DINNER MEETING PRESENTATION SHOULD START AT 7:30 PM

Site Tour Viry Martino, Project Engineer
Hosts/ Dave McConkey, Senior Superintendent
Dinner Meredith Stumpo, Senior Estimator
Meeting Turner Construction Co.
Presenters:

Dinner Turner Construction Co.
Meeting
Sponsor:

Dinner: Buffet Dinner at Jobsite prepared by El Indio
Venue: Catering scheduled to begin at 6:45 PM

Jobsite **SEE EMAILED MEETING NOTICE OR**
Location: **PROGRAM ARTICLE (PAGE 4) FOR**
DIRECTIONS TO SITE

◆ **Tuesday, September 29, 2015 — 5:30-8:30 PM**

ASPE San Diego Planning Retreat and Board of Directors' Meeting

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

◆ **Thursday, October 1, 2015 — 5:00-8:30 PM**

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

Saturday, October 3, 2015 — 8:00 AM to 1:15 PM

ASPE Joint Northwest/Southwest Regional Meeting

Location: Clarion Hotel near SeaTac Airport
Renton, WA

◆ **Tuesday, October 13, 2015 — 5:30 PM Registration**

Joint NAWIC/ASPE San Diego Dinner Meeting

Program: Drone Technology for Construction

Speakers: Dan Burton, CEO & Co-Founder
Eli Tamanaha, CTO & Co-Founder
DroneBase

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

RSVP DUE BY NOON ON THURS., OCTOBER 8th

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

ASPE San Diego Board of Directors' Meeting

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

◆ **Tuesday, November 17, 2015 — 5:00 PM Registration**

ASPE San Diego Monthly Dinner Meeting

Program: Target Value Design and Integrated Project Delivery: What Do These Innovations Mean for Estimators?

Speaker: Dave Umstot, P.E.
Umstot Project and Facilities Solutions

Location: *To be determined*

◆ **Tuesday, December 1, 2015 — 5:30-7:30 PM**

ASPE San Diego Board of Directors' Meeting

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

◆ **Friday, December 18, 2015 — 7:00 AM Registration**

Joint ASPE/CSI San Diego Christmas Breakfast Mtg

Breakfast **BEGINS PROMPTLY AT 7:30 AM**
Service:

Program: 2016 Economic Forecast

Speaker: Alan Nevin, Director of Economic & Market Research, Xpera Group

Location: Admiral Baker Golf Course Clubhouse
2400 Admiral Baker Road, San Diego

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

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Dan Luckhardt, CPE

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Paul Chang, E

2015-2016 Chapter Officers

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S.D. Mator

Register Today!

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Site Tour & Dinner Meeting for
Otay Border Crossing/Otay Border Xpress ...

It's Otay to Cross Now

CONTACT US

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It's O'tay to Cross Now



The Turner team at the O'tay-Tijuana Cross Border pedestrian bridge structure in place, connecting the the first ever privately-owned border crossing.

The project is located just north of the international San Diego, California, and will allow ticketed airline cross from the United States directly into the Tijuana located fewer than 400-ft away on the south side of the States. These passengers currently cross the border at the vicinity and endure unpredictable border wait times.

"This is such a unique project, definitely a game changer. Viry Martino, project engineer, discussing the bridge from a physical standpoint, but from a cultural one as well, the concept since I was young growing up in Tijuana." "I'm proud to be part of the bi-national collaboration, and some point in my travels."

The bridge is one part of the larger project, which includes States Customs and Border Protection (CBP) operations and enforcement areas, and will also provide access to long-term parking, shops and restaurants. The completion by the end of the year.



This picture is from a Union Tribune Article on August 8, 2015:

<http://www.sandiegouniontribune.com/news/2015/aug/08/toll-crossing-otay-mesa-tijuana-airport-border/>

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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