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Send any submissions to: aspenews@aspenational.org

Society Business Office:
American Society of Professional Estimators
2525 Perimeter Place Drive
Suite 103
Nashville, TN 37214
615.316.9200 (Phone)

Tina Cooke
tina@aspenational.org
- Bookkeeping
- Website Management
- Publications
- Merchandise

Jennifer Cochran
jennifer@aspenational.org
- Membership
- Online Classes
- PIE Exam

Ashley Stone
ashley@aspenational.org
- Certification

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mtaylor@mticost.com

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We are a fellowship of professional estimators pursuing excellence in construction through a variety of resources.
MESSAGE FROM THE PRESIDENT

Marcene N. Taylor, CPE
mtaylor@mticost.com

ASPE is an organization comprised of our members across the country dedicated to the promotion of the construction industry and the career of estimating. To achieve our goals and provide value to our members as well as to our industry, we must remain relevant and efficient. I am fond of reminding our board, committees, and staff that “the ‘P’ stands for Professional.” I am committed to publishing and providing professional programs that promote ASPE. To accomplish this goal, we need help from our members.

Certification Needs
The Certification Committee held their biannual meeting in Nashville in January. Our Certification program is the keystone of the organization, and we have made great strides over the last decade in developing our certification program. The program is accredited by the Council of Engineering & Scientific Specialty Boards (CESB) and recognized by the American Council for Construction Education (ACCE). The General Estimating Knowledge (GEK) exam has been rewritten using appropriate methodologies, and the Certification Candidate Handbook has been updated. The next major task is rewriting each Discipline Specific Test (DST).

I am asking for volunteers who are currently Certified Professional Estimators in all disciplines to assist us in rewrite our DST exams to ensure they test current estimating practices, use effective test questions, and are professional. Our goal is to have all ten of the DST exams rewritten this fiscal year. This will require a major effort; but if we divide the duties among more people, the impact to each person will be smaller. Not only will you leave a lasting impact on the viability of the certification program, but you will also earn Professional Development Units that apply to your own certification renewal.

Publication Needs
You will be seeing the rollout this month of our promised website and social media updates. An important part of this effort is creating content that has value to our members as well as the industry-at-large. In addition to our regular publication Estimating Today, we will be publishing regular blog posts. We are moving from being an estimating echo chamber to content creators that promote discussion and interaction regarding estimating as a career.

I am asking for volunteers to contribute estimating-related articles and posts to our publications. This will be an ongoing and increasing effort as the organization grows. Being an organization of content creators will increase our stature in the industry and provide value to current and future members. We have an editorial calendar with specific topics and timelines identified, and we have guidelines for blog posts. Blog posts are especially easy to complete because they entail about three paragraphs on a topic and a great picture. As above, if you volunteer for the publication tasks, you will earn Professional Development Units that apply to your own certification renewal.

If you are interested in learning more about either of these opportunities, please contact me directly. Thanks again for your membership and the time you devote to the Society.
What Were Once Standards Are Now Vices

You're a seasoned estimator, having been in the industry 10 years or more; and you and your team are highly successful, consistently winning projects that are profitably built by the production team. Everything is as it should be and life is great; wrong, everyday the things that have made us successful age on the shelf. The systems and methods employed to pursue work and put it in place are challenged exponentially by the amount of time they have been put in place as new methods and technology develop.

Successful teams have learned from their mistakes; they have put in place policies and procedures intended to eliminate a repeat of failure. We have all seen these “Check Forms” for “Site Visits”, for “Go No Go” decision making and so on and so forth it goes and that is how “Standards” come into play with a company.

The use of Standards on the outset is highly consistent with the people that have put in the effort to create them in the first place. There is an inherent value to an organization when the team comes around a project and makes it their own. But things change, some of these people may take on other roles in the company, and little by little the disciplined application wains and the level of use of the standard falls off by the team. This is how the vice of apathy sets in and winning habits are broken.

The original purpose of “Check Forms” is to have this Knowledge/Experience accompany people into the field as they investigate the site or whatever the process being applied is. These check lists act as both an aid in mentally checking all aspects of a site visit, and based on the collective experience. This experience is relived each time the “Check Form” is used with the communication of the information up the chain of command. These forms capture the history of costly lesson(s) learned that are the inspiration for noting all manner of conditions on site form. The actual repetitive use of the forms creates a culture for communication among the firm and is the basis of the foundation of a “Habit.”

In the book "How Habits Work”, from the appendix of The Power of Habit, three elements of how habits are created are identified. They are as follows.

**“The Cue”**

“The cue for a habit can be anything that triggers the habit. Cues most generally fall under the following categories: a location, a time of day, other people, an emotional state, or an immediately preceding action.”

For example, with the use of a site visit may be triggered by a project notice being issued to the Business Development person in your firm. Every week on Monday morning the “Management Team” meets to review the projects the “Team” is pursuing and either commits resources to allocate to those pursuits or doesn’t. The meeting itself is habitual, taking place on a particular week day every week. From the meeting and subsequent to a “Go No Go” review, another possible habit, the project is assigned to a team member(s) and the pursuit is undertaken.

**“The Routine”**

A habit’s routine is the most obvious element: it’s the behavior you wish to strengthen in the operation of the firm. In our example, the Monday morning Project Pursuit meeting is the routine out of which assignments are given for the pursuit, and is the underlying routine.

**“The Reward”**

The reward is the reason the brain decides the previous steps are worth remembering for the future. The reward provides positive reinforcement for the desired behavior, making it more likely that you will produce that behavior again in the future.

In our example above, the reward is the successful pursuit for profitable work, and the resulting positive job retention and the company remains profitable etcetera, financial projections are met and bonuses paid out. In other words, your stock goes up, all good things.
So the interesting thing is that often a whole business model can become habitual. The uses of Habits that beget other Habits make this very powerful. Science has long recognized the importance of habits and how they free up the mind for greater creativity or analytic prospect. So in an organization operating with a business model based on positive habits, other team members almost know by instinct what others are doing in any given area and are freed up with their actions. The Production Team knows that the Estimating Department is working on bringing in new “Meat” for the tribe. This frees them up for closing out their job properly rather than having to suddenly pursue work and compromise the successful closing of the project at the end by putting focus on a project pursuit. So as the Business Development department is bringing in new leads and they are being assigned to a competent team to perfect the pursuit, this makes for an efficient operation.

Now with the latter as a back drop, this may be a good time to access what items you have in your own firms “Standards” and identify those that have become stale. No company is well served when “Standards” have been allowed to become stale, age on the shelf, become out dated, and used infrequently if at all.

Most of us recall using colored pencils to highlight drawings for organizational purposes as well as checking off what has been taken off and what remains to be taken off. With the use of the digital technology, takeoff has become very valuable as a tool to share with the client certain scopes of work that are included and those that are even excluded, thereby facilitating communication. Reassessing the use of technology has impacted all construction firms as we utilize this technology and as it relates to becoming a habitual element of the project pursuit process, is important. Because at the end of the day, as leaders in our firms and industry, we all want to “inspect what you expect”. In doing this one thing requires one to have the understanding of the “Habit” and that without the cycle of review then things will slowly disappear and fall by the way side taking the “Habit” to “Apathy” where what were once Standards are now Vices.

In the online reference The Seven Virtues - Changing Minds, the author notes that there are “also a number of other sets of virtues, including: The Seven Contrary Virtues which are specific opposites to the Seven Deadly Sins: Humility against pride, Kindness against envy, Abstinence against gluttony, Chastity against lust, Patience against anger, Liberality against greed, and Diligence against sloth.”

So let’s all take a diligent stand and note those Standards that have been our friends. Let’s reemphasizes and identify them and those applying those standards with in our organizations. Brand them habitual by application in our daily operations so that we can stand strong before apathy / sloth as it is defined.

Sloth - slōTH,slōTH/

*Noun:* reluctance to work or make an effort; laziness.
"he should overcome his natural sloth and complacency"

*synonyms:* laziness, idleness, indolence, slothfulness, inactivity, inertia, sluggishness, shiftlessness, apathy, acedia, listlessness, lassitude, lethargy, languor, torpidity;

*literary* hebetude

"who is responsible for the sloth of this department?"

In closing it is good business to have “Standards” as they apply to your own firm’s consistent conscious efforts in pursuit of work. Properly utilized, these Standards should take on the form of “Habits” as a collective conscious of the firm. The use of these Standards should be noted and checked-off in the course of inspecting what you expect; and through this simple act, the establishment of “Habits” take place. From these habits comes consistency as it applies to project pursuits, and consistency is what mitigates risk to management in good times and bad. ☯
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The Implied Intent of “Standard Estimating Practice”

Imagine you have entered a new school in the middle of the year. The course you enter is Math. In fact, it was the day of the mid-term exam. The teacher invites you to take the exam even though you’ve had no class time. How do you think you would perform? With no tools or structure of the subject and not aware of some formulas, you would probably not perform very well. In the Estimating world, it would be like a General Contractor hiring a new employee with no experience in estimating and giving him a project to estimate and prepare for bid. What could be expected by this employee? These two scenarios would not be considered a Standard Practice, although they have both happened. What does Standard Practice really mean?

“Standard” has many forms of definition. It is something established by authority as a model, example or rule for the measure of quality, weight, extent, quantity or value. “Standard” implies a level of quality that is considered acceptable and desirable established by law or Custom. The American Society of Professional Estimators has seen the importance and necessity to distribute documents based on consensus, which can take the form of specifications, procedural requirements and recommendations, or even handbook directions. This document is the “Standard Estimating Practice”. It is a living document that is updated to suit the changing needs and technology in the construction industry. It is imperative that the highest source of quality information and guidance be available in such a large industry as Construction Estimating. What are the objectives of “Standard Estimating Practice”?

The implied intent of the manual, “Standard Estimating Practice”, is many;

1. To provide basic and fundamental direction for estimators.
2. To define industry standards as being the basis for certification of experienced estimators as Certified Professional Estimators.
3. To improve efficiency and productivity in the construction estimating industry by discouraging unsatisfactory practices.
4. To foster growth in the level of training and skill development in the estimating industry.
5. To make best practice and continuous improvement an essential part of estimating.
6. To communicate the standards of ethical conduct and moral judgement.
7. To provide the basic standards in the practice of construction estimating which include; Ethics, Integrity, Judgement, Attitude, Thoroughness, Awareness, Uniformity, Consistency, Verification and Documentation.
8. Different levels of estimating.
9. Practice common to all disciplines in either Masterformat TM 2012 or Uniformat II.
10. Provide a history and overview of the Certified Professional Estimator.
11. Provide conversion tables for American measure and metric factors.

By having the Standard Estimating Practice manual, this tool can be invaluable to not only new estimators, but CPEs as well, in their desire for excellence and continued education in current trends and improved practices in the Construction Estimating Industry. Certified Professional Estimator is the highest form of professional recognition an individual estimator can receive. This manual, “Standard Estimating Practice”, provides the best professional pathway to accomplishing the goal of CPE.

By: Ron Svarc, ASPE, CPE, AACE, GC, MBA, FEWA
Orange County Chapter 3
Standards are one of the things that allow us to function as a Nation, as a Society (global sense), a Society (ASPE sense), as an industry, and as whatever subgroup you wish to include yourself in. Or out of in some cases, because we have standards for the things we don’t want as well. Wow, this is sounding political, which is not my intent, nor the Board of Trustees intent, nor the Society’s intent. After all, we have standards about that sort of thing.

Believe it or not, you can’t go a day in your life without using some sort of standard. Did you buy gas for your car? In the good ol’ U.S. of A. you bought gasoline by the gallon. A gallon of gas is the same measurement in Maine as it is in Florida, California, Washington, even Alaska or Hawaii. The price may be different for that same gallon, but amount is standardized. The first mile you drive that vehicle is the same distance as the mile someone else drives their vehicle in another part of the country. Because a mile is a standardized unit of measure.

Standards have not always existed. Noah was instructed to build an ark 300 cubits long by 50 cubits by 30 cubits tall. OK, what is a cubit? Now we lose standardization. A cubit is the length of a man’s forearm. First of all, read that exactly, and the president of our Society can’t build an ark, because she doesn’t have a man’s forearm. Joe Fleming and Bill Manfredonia can’t build an ark together, because they have very different forearm lengths. OK, let’s convert it and use the American favorite, the inch. Which used to be defined as the length of three kernels of grain reaped after the fall harvest time that have been laid end to end. So, San Diego, Chicago, and Denver can’t use an inch as a unit of measure, because each is a city and doesn’t grow its own grain. So, a foot is 36 kernels of grain? Nope, a foot was just that, the length of a man’s foot. Until it became standardized as the length of the King’s foot. So you had to get a new ruler every time the king passed away. Now imagine using those dimensions, and try to build a bridge in California using steel produced in Pennsylvania. With lumber cut in Wisconsin. All of which would have a different king with different sized feet.

The American National Standards Institute has been recognized to solve these problems. But what about the things it doesn’t solve? How about “footer vs. footing vs. foundation vs. wall spreader”? Is it a 2x4, a twoby, or a stud? Rebar and rerod are the same thing, just spoken by two different generation of “mud guys” (or are they cement masons?). Some things that have standards don’t ancillary standards.

Now that you have a sense of the importance of standardization, we can now discuss how we choose to deviate from the standard….not that any of us would ever do so, right? I was originally taught that the formula for computing the amount of concrete needed was length times width times height, then divide by 27. Simple. Then after I was working in the industry for a few days, I was informed that once I performed that calculation, I need to add 5%, or multiply by 1.05 to get the compacted or “site amount” needed. A few jobs later, and my boss told me to just divide by 25 – it gets almost the same result, and makes the math easier (pre calculator). So which is the correct method? Whichever is the preferred method of the person signing my paycheck. That is my standard.
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Section 1 – Introduction

This technical paper is intended to provide a general understanding of how to develop a cost estimate for a bathroom renovation in an existing hospital. The daily operations of a hospital require the contractor to take special care in the demolition and removal of construction dust and debris due to the potential risks involved with already ill patients. This paper hopes to identify the challenges involved and factor into the cost estimate accordingly along with all labor, materials and equipment necessary to complete the renovation.

Main CSI Divisions

- Division 09 Finishes
- Division 10 Specialties
- Division 15 Plumbing
- Division 16 Electrical

Main CSI Subdivisions

- Subdivisions 09050 Basic Material and Methods, 09200 Plaster & Gypsum Board, 09300 Tile, 09500 Ceilings, 09900 Paints & Coatings
- Subdivisions 10050 Basic Materials and Methods, 10800 Toilet & Bath Accessories
- Subdivisions 15100 Selective Demolition, 15100 Piping, 15400 Lavatories, 15950 Testing/Adjusting/Balancing
- Subdivision 16500 Lighting

Brief Description

The author will discuss the process of estimating the cost of renovating a bathroom in an existing hospital. Estimating methods will be described to explain how an estimate is created from current design plans, notes and narratives. Special care will need to be taken as an operating healthcare facility cannot have construction dust and debris spread throughout the facility. The infection risk to ill patients is a matter of life, death & liability to the patients, the general contractor and the hospital itself.

Section 2- Types of Methods of Measurements

Quantity takeoffs vary with the items involved. Some items such as floors, walls and ceilings will be measured by square feet (SQ FT) for both demolition and replacement purposes; most toilet specialties will be counted as each (EACH) while casework and counters will be measured in linear feet (LN FT); piping will be measured as linear feet (LN FT); testing / adjusting/balancing the plumbing work will be measured in hours (HOURS) of labor needed.

The ceiling height will help to determine the square footage of the walls and wall finishes. The length of the wall times the height of the wall/finish will develop the necessary quantities that need priced and placed into the estimate. The scaling of the drawings properly is perhaps one of the most important facets of estimating. More will be explained throughout the technical paper when appropriate.

Section 3 - Overview of Estimating a Bathroom Renovation Project

Cost estimating is the measurement, evaluation and comparison of the costs of a project. Estimating the cost of an existing bathroom renovation will first
consist of demolition costs associated with removing existing items, followed by the replacement costs of the materials and the time it takes to install those items. It is first important to review all current documents for completeness and to evaluate the level of detail available. Once this is done, the drawings can be entered into the computer software for quantity take-offs of the drawing. They can then be scaled using the given scaled measurements, checked for dimensional accuracy and labeled accordingly. Demolition drawings are best to start with as it gives the estimator an idea of the extent of renovations from which to gauge the project objectives. Once the demo notes are read and understood, one can then begin counting the walls, floors, doors, ceilings, toilet partitions and associated plumbing and lighting fixtures to be removed. One must consult the demolition plans, notes, drawings and narratives to ascertain the extent of the demolition, which will vary from project to project. Some jobs call for complete ‘gut job’ demolition while others will maintain some existing items that are not at the end of their life cycle. As a former contractor, removal of all finishes and fixtures allows for the best end result for the bathroom renovation project. Although, any items that are kept or reusable will save on demolition and replacement costs, thus allowing for a lowered project cost.

Section 4 - Fundamentals in Estimate Preparation / Locating Information

Floor Plans are the fundamental basis when evaluating the layout of a building. These documents will give you a visual display of what goes where. The difference between ADA and regular toilet partitions are easily distinguishable on the floor plan due to their varying sizes. Once scaled, you can now reference the finish schedule and finish legend to determine what floor finish will be used. You can also evaluate wall finishes and in particular, look for notes regarding the height of wall tile to be installed. Most hospital restrooms select one of the following - wall tile only at wet walls, wainscot wall tile or full height wall tile throughout. I have seen budgets determine the extent of wall tile used as it can be costly. The area of wall tile can greatly exceed the floor tile and be quite costly. Finishes are at times noted directly on the floor plans, and other times in a separate finish plan. I find it best to always review and verify using the room finish schedule. This document can be one of the most valuable instruments in determining quantities and material selection. Reflected ceiling plan drawings will show the ceiling layout and materials selected. For small projects, these may also be on the floor plan. Quantities of walls to be replaced will be taken off using a linear feet measuring the length of the wall multiplied by the height of the wall to attain the square footage of wall. Calculate a price for the wall assembly and enter into the estimate along with any components such as drywall finishing, sanding, texture or paint. Ceilings and floor finishes are taken off by area and entered accordingly with the appropriate pricing for selected materials.

Obviously, we all make assumptions as the progress of drawings often fall short in describing exactly what is needed. Solid construction documents will offer enlarged interior elevations showing the height, location and description of all items to be installed. Basic necessities include countertops, toilet paper holders, soap dispensers, mirrors and paper towel dispenser. Luxury items can include base cabinets, costly recessed paper towel / trash receptacles, recessed baby changing stations, electric hand dryers, toilet seat cover dispensers, and sanitary napkin dispensers. It is extremely critical to note what, if any, items are contractor furnished and owner furnished. This also goes for items that can be owner furnished yet installed by the contractor. Mistakes in identifying who is responsible for purchasing and installing various fixtures will surely affect the accuracy of the estimate. All toilet specialties need to be totaled for a count, entered into the estimate and priced accordingly. Countertops and base cabinets will be totaled in linear feet while most other specialties will be counted as each.

There should not be any structural modifications necessary for a bathroom renovation. The only exception would be if adding ceiling hung toilet partitions. In rare cases, it may be necessary to strengthen the ceiling by adding in additional steel beams. If need be, determine the added steel from the structural framing layout and estimate the labor hours it would take to install. Add this into the estimate with the appropriate wage rates to cover this item if necessary.

Any MEP drawings need to be analyzed and considered in conjunction of one another and the demolition plans. Each drawing in the design set has clues as to the total amount of work being done, and all of those clues need to be gathered and shown within the estimate to ensure complete accuracy. For instance, any mechanical upgrades being done in the ceiling crawl space is a great way to predict most or all of the ceilings will need replaced. This can be determined from the mechanical, ceiling and demolition drawings and it is best to check all three for matching details. There will be times when design drawings are incomplete and the estimator has to contact the owner/design team for answers to questions that arise. Evaluate the demolition to determine the extent of the mechanical demo and then move to the mechanical plans to see what is being replaced. Most likely, mechanical changes are minimal for a simple bathroom renovation. We will assume no HVAC changes for the technical paper.

Electrical work may be limited to light fixture replacements or can include a full building redo. For the purposes of this paper, we are concerned only with the local fixtures and necessary wiring. Schedules will be consulted for reference in hopes that the
recommendations have been filled in. The estimator is in a much better position to accurately reflect the project’s needs when the professional consultants have finished their calculations and selected the appropriate materials. The estimator can then count the lengths of wires needed, receptacles, fixtures and any final connections needed to complete the renovation. Concerns for extra labor man hours may be addressed as renovations can find problems within the walls that could not be foreseen. The electrical schedule will outline the specific equipment to be counted, priced and entered into the estimate.

The plumbing drawings will also be reviewed in conjunction with demolition drawings, notes and narratives. Plumbing schedules will be helpful in selecting the toilets, sinks and other fixtures and determining the cost of each for the estimate. Consideration must be taken to note whether the sinks and toilets are ADA compliant if needed, in which there should be at least one of each in a public restroom. Count each fixture and any piping that may need rerouted or replaced. Additional labor must be estimated for final connections of all piping, toilets, and any miscellaneous items. All plumbing items should then be counted, priced and entered into the estimate.

Section 5 - Special Risk Considerations

Working in an existing hospital will require extra special attention from the general contractor in regards to dust and debris associated with demolition work. Assigning costs to the special care that will need to be taken is known as ICRA costs (Infectious Control Risk Assessment) which are required by law. This will be above and beyond the general dust and debris containment of a normal residential or commercial remodel because the airborne dust and debris can pose extreme health risks in a sterile hospital environment. Airborne dust has the ability to penetrate HVAC systems and therefore carry into the entire building, possibly contaminating areas outside of the project area which can impose great risk to the already ill patients. Inadvertent exposures to environmental or airborne pathogens can result in adverse patient outcomes and cause illness among health-care workers. Environmental infection-control strategies and engineering controls can effectively prevent these infections. These costs must be evaluated and incorporated into the estimate and can at times be as costly as the project construction itself.

There are several ICRA Levels of protection that can be utilized depending on the intensity of the protective measures required. The level is directly related to the location of the bathroom within the hospital and its immediate surroundings. A public restroom in the Intensive Care Unit corridor will obviously mandate greater protection from roaming dust and debris than a restroom in the entrance lobby. Estimators generally prefer that the ICRA Level is predetermined by the design team and if not, it is best to be conservative and plan for the worst case scenario due to the potential budget disaster that could occur. This can be done using historical square foot costs for the required level of protection or by pricing each protective measure needed and adding up the total combined costs. Below is a list of the possible protective measures that may be needed and will affect the cost of the estimate:

- use of dust-control procedures and barrier during construction, repair, renovation, or demolition
- environmental infection-control measures for special areas with patients at high risk
- use of airborne-particle sampling to monitor the effectiveness of air filtration and dust control measures
- maintain negative air pressure
- seal all holes, pipes, conduits
- personnel must be properly dressed
- construct anteroom
- procedures to prevent airborne contamination in operating rooms
- environmental surface cleaning and disinfection strategies with respect to antibiotic-resistant microorganisms
- use the list we have at work
- isolate HVAC system
- wet mop and vacuum with HEPA filters
- complete all critical barriers
- contain construction waste in tightly covered containers

The fact is that older buildings may have deficiencies in their design/build that can affect the proposed plan of construction renovations. The design/construction contingency percentage included in the mark-ups are exactly for this purpose. This prepares the budget for the possibility that an event may occur that is not likely or intended; a possibility that must be prepared for as there is uncertainty as to what is behind the walls we are about to demolish. The project could possibly find hazardous materials within those walls or an inadequate mechanical existence that requires more resources to fix. Hazard material removal can greatly affect the cost of the project as special care must be taken to remove and dispose. Abatement as an estimating matter is a considerable cost driver. In the event hazardous materials do exist within the bathroom, one would need to reference the project’s Hazmat Report to reference the quantities that need removed. It’s possible there could be 400 square feet of asbestos containing vinyl floor tile that will be professionally removed and disposed. At that point the estimator could price the abatement work per the quantities and apply a unit price, unless a quote has been provided for the abatement work. Regardless of how the estimated abatement number is attained, it will be included in the 0200 section separate from the non-hazardous demolition costs for the purpose of clarity.
Section 6-Overview of Markups

Notes should be added within the estimate for each line item to address where the pricing was attained for several reasons, including explanations of material, labor and equipment pricing as well as productivity. Price verification in the event of a review will be easier with names, phone numbers and websites available to confirm the cost of a specific product. The note also helps the reviewer confirm the estimator selected the appropriate product to price. Product prices can vary by as much as tenfold depending on the materials, design and quality of said products. Noting a toilet or sink’s make and model along with the supplier's pricing and contact information is the best scenario ensuring the owner/client that they have received an estimate given its due diligence.

Once quantities and pricing are verified, each discipline can submit their individual estimate to the project lead for combining and review of the overall estimate. It is important to review the cost of each discipline and consider the extent of their specific work to see if it is relatively in conjunction with the overall budget. For instance, if the electrical budget is 45% of the overall cost – that would cause concern and the estimator may want to double-check that particular discipline before moving ahead any further. The electrical costs may in fact represent the actual work to be performed. It is possible that the requested light fixture are LED or unique to a certain high-end manufacturer that send the costs skyrocketing. As long as that is what the drawings, notes, narratives and schedule request – then that is what the estimate is to show. Commercial projects are often larger and use union labor as well as durable, more costly items. It is important to think only as the estimator and not a shareholder footing the bill. The owner/clients are the ones who will have to deal with shareholders and the associated project budget financing issues.

Once the estimate is compiled and reviewed for errors and completeness, the estimator can then evaluate and configure all necessary mark-ups that will be applied to the project’s direct costs to make it a realistic budget that a general contractor will similarly bid. A percentage will be applied for the following:

- General Conditions are typically 10%
- Overhead & Profit ranges from 7-10% for general contractors expected necessities
- Design/Construction Contingency can range from 3-20% for unforeseen scope additions or alterations made during the design process
- Escalation is the added cost of materials’ inflated cost when the project begins
- Bonds & Insurance - costs incurred by the GC to cover liabilities or fees incurred by taking on the project

General conditions costs can include items such as dumpster's, portable toilets, small tools, staff dedicated to the project, equipment rental, drinking water, consumable items, temporary utilities and temporary protection. These items are essential to completion of the work but not part of the scope of work illustrated in the contract documents. Use of the general conditions is essential in capturing the overall project cost without knowing all of the needs up front.

These are compounding percentages applied to the direct project costs that will result in the final marked-up project contract cost. The contingency mark-up will decrease with each phase if multiple phase estimates are to be performed. The reason it is reduced is that design contingency is an added cost applied to cover unknowns in the level of detail. When details become clearer with each design phase, the contingency can be reduced because there is far less concern for added or altered scope of work.

The contract cost will need to be compared with the allotted project budget to see if the client can afford the project. If the scope of work exceeds the allotted budget, the team may need to go back and identify ways to reduce costs whether it be keeping the existing ceiling or downgrading the materials. Value engineering and function analysis can be utilized to assist in this effort. Scope reduction may be another alternative in reducing the project cost if need be.

Section 7 - Geographic Effects on Project Budget

The labor costs tend to increase in many major metropolitan areas where the cost of living is increased. Union wage rates can be found using the Davis-Bacon Wage Rates found on the government sponsored website. The Davis–Bacon Act of 1931 is a United States Federal law that establishes the requirement for paying the local prevailing wages on public works projects. It applies to “contractors and subcontractors performing on federally funded or assisted contracts in excess of $2,000 for the construction, alteration, or repair (including painting and decorating) of public buildings or public works.” We will assume union rates in the region found at http://davisbacon.org are current and applicable for each trade, thus allowing the estimator to accurately price the project labor. Another factor is the whether the project will be affected by traffic, access, parking and other factors in congested urban environments. If the project is in an area plagued by any of the big city issues, a premium may be placed into the estimate to cover any inconveniences associated with performing the project efficiently. This can be done with an added percentage or line item costs.
Section 8 - Bathroom Design Drawings
These drawings were scaled and used to quantify the renovation of a bathroom in an existing hospital in a VA hospital in Iowa. The Veterans Health Administration (VHA) is the component of the United States Department of Veterans Affairs (VA) that implements the medical assistance program of the VA through the administration and operation of numerous VA outpatient clinics, hospitals, medical centers and long-term healthcare facilities.
Section 9 - Sample Estimate

The format of the estimate below shows the cost of each line item to be priced in the estimate. This particular estimate was developed in Winest Software, a popular and easy to use program widely accepted in the construction industry. The ‘Location’ column identifies the contractor responsible for the work in that section and is followed by the ‘Major Section Code’ which follows the CSI work breakdown structure. Both of these column tags help reviewers to easily locate a specific item within a large estimate by the contractor and number sequence associated with the item. The ‘Item Description’ lists the actual item or service to be performed or installed. The ’Takeoff Quantity’ and ‘Unit’ of measure help to describe the number and unit to be priced. Finally, the ‘Material Unit Price’, Labor Unit Price’ and ‘Equipment Unit Price’ columns quantify the cost of each facet which roll up into the ‘Total Unit Price’ of each unit. The final ‘Grand Total’ column represents the entire cost of that particular item on the project.

<table>
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<tr>
<th>Location</th>
<th>Major Section Code</th>
<th>Item Description</th>
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<th>Unit</th>
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<th>Equip Unit Price</th>
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STANDARDS COMMITTEE UPDATE

The ASPE National Standards Committee is charged with the responsibility of maintaining the ASPE Standards of Estimating Practice (SEP) Manual. Similar to the other committees in our Society, Standards used to consist of a representative from each of our national Regions. With the recent restructuring of Committees, however, any member may be appointed to serve – regardless of geographic location. Our advisor and representative on the Board of Trustees is 1st Vice-President Bruce Schlesier, CPE.

Now that we’ve gotten the basics out of the way, you may be asking yourself, “So, what does the Standards Committee actually do?” As this is my 2nd tour of duty on Standards, I know many of you envision this group sitting around a conference table correcting grammar in our Standard Estimating Practice (SEP) Manual. As is the case in many instances, perception is far from reality.

While we will be spending time cleaning up and reformatting the 9th edition of the SEP Manual, our intent is to include new “How to Estimate the Cost of” sections in the 10th edition. Our goal is to have a Manual which contains instructions for all major CSI divisions. In order to accomplish this, the Standards Committee is seeking volunteers in their respective fields of expertise to “champion” new sections to the book.

Like most of you, my spare time is at a premium. Therefore, the obvious question becomes, “What’s in it for me if I spend the time/energy contributing to the SEP Manual?” Aside from the satisfaction of giving back to ASPE, there are additional incentives for contributing to this new edition:

- The author’s name will appear as a contributor to the Manual.
- CPE’s will obtain 10 PDU’s towards their Recertification requirements.
- Members who are thinking of entering the CPE program may (with consent of the Certification Board) be able to use this paper as their required CPE technical paper.

AND

- The Higher Education Committee has indicated they will be using our Manual as a basis for creating an estimating textbook for use at the post-secondary school level. If successful, the SEP Manual will be a means of reaching out to potential future (i.e. younger) members to our Society.

If you are interested in contributing to the SEP Manual or need additional information, feel free to contact one of the Standards Committee representatives. We look forward to hearing from you!
Imagine that the proposer has spent hours, perhaps weeks, preparing a bid proposal that should be a winning effort. The estimator in a competitive bid scenario may only have five seconds to review the proposer’s bid proposal. How does the proposer ensure that his/her bid gets the attention of the estimator? For starters, the proposer has to avoid the following common hazards. Submitting a clear, organized, well formatted bid proposal will likely ensure a winning proposal for both private, negotiated bids and public, competitively bid projects.

Hazard #1 - Who is the Proposer?
Emailed bids are the standard today; however, proposals should still be prepared on the proposer’s company letterhead. You want to look professional plus provide critical information such as company name, address, phone, fax, etc. When bids are typed in the body of an email, with no letterhead, it is not clear which company sent the email because the sender’s email address is cryptic, such as bryan1224@hotmail.com. To understand why this is a problem requires an appreciation of bid day chaos. On bid day, a general contractor may receive hundreds of bids by email. It is not unusual for ten or more bids to be sitting in the printer waiting for evaluation; so if the proposal is not on company letterhead, it takes time to go back, find the email and reply, “who is this from?” Who has time for this extra step when trying to evaluate bids, look for gaps and overlaps, check scope, get all the paperwork filled out, etc. A bid on company letterhead also conveys a sense of confidence that the company will stand behind the quote.

Hazard #2 - How Can the Proposer be Reached?
A great price has just come via email from the proposer, and the estimator wants to ensure that the proposer has fully understood the scope of work. With letterhead in hand, the estimator calls the proposing company only to find out that he/she is on a job site until after the bid is due. If the proposer cannot be available by land-line phone for a de-scope call due to a previous meeting or other commitment, the proposer should provide alternate ways of communicating with the estimator such as by cell phone number, text and email. The proliferation of smart phones provides many more ways to stay in contact. The proposer should get to know which method is preferred by the estimator in order to respond efficiently. For example, the proposer could put a note in his/her email such as, “I’ll be in a meeting this afternoon, but if you have any questions, text me at 610-656-XXXX.”

Hazard #3 - Which Proposal Revision?
Whether the project has been bid more than once, or the proposer has updated the quote for another reason, it is essential for the estimator to know the most current version. Sometimes proposals are updated more than once on the same day, so changing the date alone is not sufficient. For this reason, it is essential to show the revision number and date very clearly in the subject line of the proposal letter, preferably in bold.

Hazard #4 - Which Drawings and Specifications?
It is not unusual for negotiated projects to be estimated and bid over a period of time in which the drawings may have undergone a transformation from progress set to construction drawings. In these cases, it is helpful to include the drawing title and date such as “85% Progress Set dated 1/8/2017” at the top of the proposal. Often projects are not purchased immediately upon receipt of bids, so when the estimator goes back to his/her file he or she can easily ascertain what set of drawings the proposer estimated.

Hazard #5 - Addenda Response for a Complete Bid
Addenda can be either helpful or sometimes confusing. Addenda often serve to clarify missing information in the documents, but often
Hazard #6 - Is the Proposal Length Just Right?
On one recent project an estimator received two hollow core plank proposals - one via email that simply stated, "Plank - $345,000, excludes caulkling" and the other was nine pages long with a quote on page five of $365,000. Like the story of the Three Bears, the porridge was either too hot or too cold. Somewhere in the middle it is just right. Reciting the scope of work in a proposal is largely a matter of preference and could be endlessly debated by estimators. Here are a few points to consider:

1. Do the drawings convey quantities adequately? If yes, then the drawings can speak for themselves. If there is some ambiguity within the drawings, then clarification is needed. For example, the HVAC equipment schedule lists a piece of equipment that is not found on the drawings. In this case, it would be helpful for the proposer to provide the estimator a unit price for this piece of equipment in case there is an opportunity for the estimator to clarify with the project owner/client.

2. Are the drawings and specifications in harmony with each other?

For example, the specification notes a recovery board on the roof but the roof detail omits it. Providing a value for the recovery board would assist the estimator in evaluating the bid. Generally, one to two pages is a reasonable length that can be easily digested (assuming it is not design/build).

Hazard #7 – For which Trade is the Bid?
Often estimators have very little time to review bids, particularly in the case of competitive bids. Therefore, a clear indication of the trade the proposer is bidding and the specification sections included would be quickly and easily found within the proposal. If the proposer is amenable to breaking his/her bid into multiple packages (such as roofing, waterproofing, air barrier, joint sealants), then it should be broken down in the first proposal instead of the estimator calling for a breakout one hour before the bid is due.

Acknowledging “plans and specs” is a great way to start; but this approach might also lead the estimator to wonder if the proposer understands the job, in which case a very general statement of scope might be beneficial.

Hazard #8 - Competitive Bidding versus Negotiated Bidding
A proposer should understand the environment in which he or she is bidding. For example, in public bidding, no exceptions or qualifications can be made except possibly by asking for substitution or RFI prior to bidding. It is unfair to submit a bid that cannot possibly meet the specification. Noncompliance puts the estimator in financial jeopardy if the architect rejects the submittal later. Conversely, in a private negotiated project, it is generally appreciated by the owner to obtain alternate proposals that save money or can provide better value. In private negotiated bids, noting the exceptions to the project document is very important.

Hazard #9 - Job Specific versus Standard Exclusions
Evaluating exclusions to the bid proposal quickly is challenging for the estimator. Therefore, the proposer should divide exclusions into two categories: (1) items that are excluded from the specific project and (2) items that are always excluded. For example, if the architect added something unusual to the specifications or drawings that the proposer cannot perform, but it is related to their work, then it should be noted as a project specific exclusion. On the other hand, if the mason always excludes metal flashing due to jurisdictional trade constraints, even though it is customarily in their specification, then it might be characterized as a standard exclusion. The proposer should never exclude something that does not apply to the project because this leads to unnecessary confusion.

Hazard #10 – Does the Proposer Furnish and Install?
In most cases, estimators know which items will come furnished only or furnished and installed, but there are still many items which could be quoted either way. For example, one millworker may fabricate only whereas another might furnish and install their millwork. Therefore, for the sake of clarity, the item should be noted whether it is "Furnished and Delivered" or "Furnished and Installed/Erected." If the item is furnished only, the proposer should clearly note whether delivery is included and whether it is FOB jobsite or FOB factory. Also, taxes should be clearly identified (see Hazard #13 for more below on that topic). Depending on locality and bidders, it is important to...
know if the project or owner requires union labor and/or prevailing wage rate labor. The proposer should acknowledge what type of labor he or she intends to provide.

**Hazard #11 - Does the Bid Account for Regional Bidding Norms?**

If bidding in a different region or locale, it is best to do some research in advance to understand unique jurisdictional trade issues and norms. For example, in some areas, the mason might exclude rebar whereas in others it is included for their own work. In one region it might be customary to bid structural steel fabrication separately from erection whereas in another region fabrication and erection comes as a package. Simply doing some homework before venturing into a new region, will help the bidder know how to prepare his/her bid proposal and prevent misunderstandings.

**Hazard #12 – Know the Actual Sales Tax Rules**

Sales tax and associated exemptions can be very tricky and rules vary widely by state and locality. If the project is public, non-profit, educational, or a hospital, these conditions should be seen as a red flag. The proposer should investigate sales tax rules, which are not always well defined in the specifications. For example, a public school in New Jersey might have a sales tax exemption on all materials purchased whereas in Pennsylvania a similar school might only get a sales tax exemption on machinery and equipment. These examples illustrate why it is essential to understand the rules, which should be clearly reflected in the bid proposal. Given that sales tax percentages might vary from 5% to 9%, the sales tax included in the bid could be the difference between the proposer being the low bidder, or the second low bidder.

**Hazard #13 - Don’t Forget the Permit**

Like sales tax, there are different rules regarding permit fee schedules for each municipality, and fee rules are updated periodically. Typically, permits are issued for demolition, general construction, plumbing, HVAC, sprinklers, fire alarm and electrical trades. The bidder should check in advance with the municipality to discover if his/her work requires a special permit. Some permit fee schedules are now online but others have to be confirmed via a phone call. If the proposer’s trade requires a permit, then the proposal letter should note that the fee has been included. In some municipalities, the general contractor pays the permit for the entire team, which requires the proposer to be diligent in noting whether he/she has included a permit fee or not. Permit calculation methods and costs vary widely and could add percentage points to a proposal if not addressed appropriately.

**Hazard #14 - Alternates, Unit Prices and Allowances Response**

Inadvertent omission of alternates, unit prices or allowances with the bid proposal is a common problem. Ideally, any required alternates, unit prices or allowances should be noted in the bid invitation. For the sake of completeness, the proposer should check Division One of the specifications which generally has a specification section devoted to each of these topics, when applicable. The bid proposal should list each alternate, unit price or allowance. If an alternate, unit price or allowance does not apply to the proposer’s trade, “N/A” should be noted to acknowledge that the proposer has reviewed the alternate pricing schemes. With regard to allowances, the proposer should clarify if the bid price includes an allowance that is related to his/her trade or if the assumption is that the general contractor should include the allowance. For example, if there is a door hardware allowance of $50,000, the proposal should clearly note if this was incorporated into the overall bid. Following these steps will eliminate trying to hastily calculate these costs on bid day.

**Hazard #15 - Proposer General Terms and Conditions Pitfall**

General terms and conditions, which may be not directly controlled by the individual proposer, can vary significantly from bidder to bidder based on company policy that is driven by business decisions and past history. Since general terms and conditions are typically not project specific, it is best for the proposer to provide them at the end of the proposal and ensure that the terms and conditions actually apply to the project. From the perspective of the estimator, fewer terms and conditions mean less time working out the details of a contract which could take weeks. Assuming all other evaluation factors are equal, who do you think is going to get the
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<td>Lombard Consulting Services Inc</td>
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<td>E Light Electric</td>
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<td>Michael Shampton, CPE</td>
<td>W.E. O'Neil Construction Co. AZ</td>
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<td>GE Johnson Construction Co</td>
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<td>Sierra Landscape Development, Inc.</td>
<td>Landrun-Oklahoma City # 80</td>
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<td>Paul G. Carr and Associates</td>
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<td>Northeast MAL # 94</td>
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# Chapter Meetings

## Arizona
- **Arizona # 6**
  - **Where:** Double Tree Hotel
  - **320 N 44th Street**
  - **Phoenix, -85008**
  - **Date:** 2nd Tuesday
  - **Time:** 5:30 Social Hour Starts
  - **Meeting Contact:** Tom Norton, CPE
  - aspettreasurer@gmail.com

## Arkansas
- **Arkansas # 33**
  - **Where:** Baldwin & Shell - Main Office
  - **1000 West Capital Ave.**
  - **Little Rock - 72201**
  - **Date:** 3rd Friday
  - **Time:** 12:00 Noon Social Hour Starts
  - **Meeting Contact:** Mickey Perez
  - mperez@baldwinshell.com

## California
- **Los Angeles # 1**
  - **Where:** The Barkley Restaurant
  - **1400 Huntington Drive**
  - **South Pasadena - 91030**
  - **Date:** 4th Wednesday
  - **Time:** 6:00 pm Social Hour Starts
  - **Meeting Contact:** Joe Miller, CPE
  - tspenmiller@yahoo.com

## Connecticut
- **Nutmeg # 60**
  - Information not submitted at this time
  - **Contact:** Northeast Governor
  - James Hanna, CPE - jgh@dhuy.com

## Delaware
- **Delaware # 75**
  - **Where:** Varies
  - **Date:** 2nd Wednesday
  - **Time:** 5:30pm Social Hour Starts
  - **Meeting Contact:** Jason Gordon
  - jgordon@penlighting.com

## District of Columbia
- **Greater DC # 23**
  - **Where:** Jacobs
  - **1100 North Glebe Rd., Ste 12**
  - **Arlington - 22201**
  - **Date:** 3rd Thursday
  - **Time:** Varies
  - **Meeting Contact:** Maurice Touzard, CPE
  - mtouzard@gmail.com

## Florida
- **Tampa Bay # 48**
  - **Where:** Grill 116
  - **612 N. Dale Mabry**
  - **Tampa - 33609**
  - **Date:** 3rd Thursday
  - **Time:** Varies
  - **Meeting Contact:** Bob Nidzgorski, CPE
  - bob.nidzgorski@skanska.com

## Georgia
- **Atlanta #14**
  - **Where:** Sage Woodfire Tavern-Perimeter
  - **4505 Ashford Dunwoody Rd**
  - **Atlanta - 30346**
  - **Date:** 2nd Monday
  - **Time:** 11:30am Social Hour Starts
  - **Meeting Contact:** Clinton Aldridge
  - clinton.aldridge@skanska.com

## Illinois
- **Chicago #7**
  - **Where:** Barbakoa Tacos & Tequila
  - **1341 Butterfield Rd**
  - **Downers Grove - 60515**
  - **Date:** 3rd Thursday
  - **Time:** 6:00pm Social Hour Starts
  - **Meeting Contact:** Bob Svoboda, CPE
  - bsvoboda@scadifference.com

## Indiana
- **Central Indiana # 59**
  - **Where:** Varies
  - **Date:** 3rd Thursday
  - **Time:** Varies
  - **Meeting Contact:** Jeremy Atkins, CPE
  - jatkins@rheadkingroup.net

## Iowa
- **Quad Cities #71**
  - **Where:** Granite City Food & Brewery
  - **5270 Utica Ridge Rd**
  - **Davenport - 52807**
  - **Date:** 4th Tuesday
  - **Time:** Varies
  - **Meeting Contact:** Ryan Andresen
  - randresen@russellico.com

## Louisiana
- **New Orleans # 9**
  - Information not submitted at this time
  - **Contact:** Southeast Governor
  - Chuck Hesselbein, CPE - chesselbein@baldwinshell.com

## Maine
- **Maine # 37**
  - **Where:** Woodard & Curran
  - **41 Hutchins Drive**
  - **Portland - 04102**
  - **Date:** 1st Wednesday
  - **Time:** Varies
  - **Meeting Contact:** Ryan Andresen
  - randresen@russellico.com

## Maryland
- **Baltimore # 21**
  - **Where:** Varies
  - **Date:** 2nd Thursday
  - **Time:** 6:00pm Social Hour Starts
  - **Meeting Contact:** Steve Krall, CPE
  - skrall@oakcontracting.com
### MASSACHUSETTS

**Boston # 25**
Where: Courtyard by Marriott Boston-Cambridge Hotel  
777 Memorial Drive  
Cambridge - 02139  
Date: 3rd Wednesday  
Time: Varies  
Meeting Contact: Ryan Dogil  
Rdogil@selectdemoservices.com

**Viking # 39**
Information not submitted at this time  
Contact: Central Plains Governor  
Dave Westfall, CPE - dwestfall@aspengroup.com

### MICHIGAN

**Detroit # 17**
Where: Varies - visit www.aspe17.org  
Date: Varies  
Time: Varies  
Meeting Contact: Patrick Todd, CPE  
patrick.todd@aspe17.org

### MINNESOTA

**St. Louis Metro # 19**
Where: Varies  
Date: 4th Thursday  
Time: 6:00pm Social Hour Starts  
Meeting Contact: Jerry Dorhauer, Sr.  
jerry.dorhauer@belleelectrical.com

**Heartland # 32**
Where: Uncle Buck’s Grill or Bass Pro Shops - See meeting contact  
Date: 3rd Wednesday  
Time: evenings-varies  
Meeting Contact: Kelly Jarman, CPE  
Kelly.jarman@jedunn.com

### MISSOURI

**Great Plains # 35**
Information not submitted at this time  
Contact: Central Plains Governor  
Dave Westfall, CPE - dwestfall@aspengroup.com

### NEBRASKA

**Buckeye # 27**
Information not submitted at this time  
Contact: Central Plains Governor  
Dave Westfall, CPE - dwestfall@aspengroup.com

### NEVADA

**Reno # 12**
Where: TBD  
Date: TBD  
Time: TBD  
Meeting Contact: David Evans, CPE  
daveaevans@charter.net

### NEW JERSEY

**Garden State # 26**
Where: The Appian Way  
619 Langdon Street  
Orange - 07050  
Date: 4th Tuesday  
Time: Varies  
Meeting Contact: Jeffery Senholzi  
costnrv@ptd.net

### NEW MEXICO

**Roadrunner # 47**
Where: Fiestas Restaurant  
4400 Carlisle NE  
Albuquerque - 87107  
Date: 1st Wednesday  
Time: 5:30 Social Hour Starts  
Meeting Contact: Joshua Crooker-Flint, CPE  
joshc@auinc.net

### NEW YORK

**New York City # 10**
Not Active

**Empire State # 42**
Where: Athos Restaurant  
1814 Western Ave  
Albany - 12203  
Date: 10/6/16-12/16/2017  
Time: 6:00pm Social Hour Starts  
Meeting Contact: James Madison, CPE  
jmadison@arriscocontracting.com

**Western NY # 77**
Where: Panera Bread  
1501 Howard Rd  
Rochester - 14626  
Date: 2nd Thursday  
Time: Varies  
Meeting Contact: Ben Nodine, CPE  
aspewny@gmail.com

### OREGON

**Columbia-Pacific # 54**
Where: University Place  
310 W. Lincoln St.  
Portland - 97201  
Date: 3rd Tuesday  
Time: Varies  
Meeting Contact: Chana Frederick, CPE  
frederick.chana@gmail.com

### PENNSYLVANIA

**Greater Lehigh Valley # 41**
Information not submitted at this time  
Contact: Northeast Governor  
James Hanna, CPE - jgh@dhuy.com

**Three Rivers # 44**
Information not submitted at this time  
Contact: Northeast Governor  
James Hanna, CPE - jgh@dhuy.com

**Philadelphia # 61**
Where: Williamson  
500 Blair Mill Rd  
Willow Grove - 19090  
Date: 3rd Wednesday  
Time: Varies  
Meeting Contact: Lydell Williams  
ktm_perfection@msn.com

**Central Pennsylvania # 76**
Where: Loxy’s Restaurant  
500 Centerville Road  
Lancaster - 17601  
Date: 2nd Wednesday  
Time: 6:00pm Social Hour Starts  
Meeting Contact: Dan Dennis, CPE  
dd@EGSSConstruction.com

### TEXAS

**Houston # 18**
Where: Spaghetti Western’s  
1608 N Shepard  
Houston - 77007  
Date: 2nd Monday  
Time: 6:00pm Social Hour Starts  
Meeting Contact: Kenneth Barnes  
kabarnes@valerus.com

### UTAH

**Salt Lake City # 51**
Where: TBD  
Meeting Contact: John Shampton  
president@aspe51.org

### VIRGINIA

**Richmond # 82**
Where: Baskerville  
101 South 15th Street Ste. 200  
Richmond - 23219  
Date: 4th Wednesday  
Time: Varies  
Meeting Contact: Jacob Dyer  
jacob@gulfseaboard.com

### WASHINGTON

**Puget Sound # 45**
Where: Hales Ales  
Date: 3rd Tuesday  
Time: Varies  
Meeting Contact: Michael Booth, CPE  
electricbooth@msn.com

### WISCONSIN

**Brew City # 78**
Where: Varies  
Date: 2nd Tuesday  
Time: 5:30pm Social Hour Starts  
Meeting Contact: Chris Rozof, CPE  
crozof@berghammer.com

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Please NOTE: meeting information is subject to change.  
If you need to make any changes to your chapters information please email jennifer@aspenational.org
As you know by now, the Board has decided to make a change in the Executive Director position for the Society; and Patsy Smith is no longer employed by our organization. We want to acknowledge the thirteen years of work Patsy performed on behalf of the Society. As Director of Operations and later as Executive Director, Patsy helped lead our organization through growth and changes; and we appreciate her work.

As we look forward to the implementation of the Strategic Plan that was approved at the Annual Meeting in Tampa last July, the Board has appointed Elaine Cersosimo as the Interim Director of Operations. Elaine is working on a contract basis to evaluate and assess current processes and operations, recommend changes to increase efficiency and member value, and facilitate the hiring of a new Executive Director. We have outlined specific tasks to be completed in the next couple of months.

- Launch the promised website upgrades and social media campaigns.
- Finalize slate of speakers and sponsors for the 2017 Summit in Denver.
- Update all publications and forms with new logo and branding.
- Communicate with chapters regarding branding suggestions (Style Guide) and Bylaws.
- Identify and confirm a location for the 2018 Summit.
- Complete and submit renewals for CESB accreditation and ACCE recognition of the CPE program.
- Ensure all regulatory requirements such as federal tax returns and state and local filings are completed.

The Board will be meeting at the office in Nashville on March 11, 2017. If you have specific concerns, comments, or suggestions for the Board to discuss, we would love to hear from you. You are welcome to reach out to me directly.

Marcene N. Taylor, CPE
mtaylor@mticost.com
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