How to Estimate the Cost of a Building Exterior Enclosure at a Conceptual Level

ASPE Bid Simulation Road Show

The Makings of a Competent Estimator
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I have talked a lot about transformation over the past couple of years. We have revised our Bylaws, developed a strategic plan, defined short- and long-term goals, made significant structural changes, and revamped our Core Purpose and Values. Many of these changes have been in the background with only the Board, Technical Committees, and SBO staff being involved. A strong foundation has been built, and we are now at the point that we are ready to “come out of the ground” with initiatives that will be visible to our Members, as well as to the industry as a whole.

This issue of Estimating Today has a strong focus on the upcoming ASPE Steel City Summit – Developing the Next Estimator. I strongly encourage you to attend. You will spend the first two days of the Summit in sessions that provide knowledge for your personal development as an estimator as well as value to your company. You will be pleased with the quality of the speakers, information, and exhibitors.

The last day of the Summit is focused on the American Society of Professional Estimators as an organization. We will have details to announce regarding several initiatives, including changes to the professional development and renewal requirements for the Certification Program, expansion of the Scholarship Program, and roll-out of next year’s theme and chapter education modules. The Technical Committees are working diligently to provide value to our Members and the industry with new programs and offerings in our quest to be the construction industry’s leader and recognized authority in professional estimating.

We look forward to seeing you in Pittsburgh!

Marcene N. Taylor, CPE

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Chapter 90 – NW MAL
Transformation – trans·for·ma·tion: a thorough or dramatic change in form or appearance; a process by which one figure, expression, or function is converted into another that is equivalent in some important respect but is differently expressed or represented.

After years of research on organizational transformations, the results from the latest McKinsey Global Survey on the topic confirm a long-standing trend: few executives say their companies’ transformations succeed. Today, just 26% of respondents say the transformations they’re most familiar with have been very or completely successful at both improving performance and equipping the organization to sustain improvements over time. In 2012, the survey response for successful transformations was only 20%.

My first contact with the Society was in 2012, when I was asked to speak at a Regional Meeting here where I live in Northwest Arkansas. I next presented at a Regional meeting in 2014, and then again in July 2015, at what was then called the Annual Meeting in San Diego. Those of you at that meeting may remember I presented on the topic of How Do You Rate Against Good, Better or Best and Why Should You Know? That presentation included an overview of the current state of the estimating industry. I remember thinking at the time how much I’d like to work with the organization based upon (1) my research of the industry, (2) my research of the Society, and (3) what I felt were significant signs of organizational distress. By this time, I’d really become intrigued by the uniqueness of the profession of estimating and the uniqueness of the culture of the Society.

It wasn’t long after that meeting that I was contacted by what was then called the Board of Trustees, to inquire of my interest in assisting with a strategic planning initiative. Arrangements were made to join the Board at their next meeting in October. I’m very confident that neither myself nor that group had any idea of what was to transpire from that point.

The first step I take before beginning any coaching or consulting process with an individual or an organization is to conduct a survey of key participants. I’ll typically send the survey a couple of weeks prior and then analyze the results just prior to the first meeting. Having done so and based upon the survey data, it was clear that the Society was not prepared to begin a planning initiative until a multitude of very challenging dysfunctions had been confronted. Not the least of these (at least for me) was that I realized the Society was not just in need of some planning consisting of a few changes or adjustments. It was in need of a complete transformation. The question for me at the time was ‘How do I present the data and my perspectives in a way that clearly portray the seriousness of the situation, what’s at stake in the short and long term, and what next steps should be?’

There are as many opinions as there are academic and corporate theories regarding how to go about change or transformation in organizations. However, based upon my experience, they can all be summed up around the following five in order of importance, which were all clearly illustrated in the Society’s survey data at the time.

1. The absence of a clearly articulated set of core values, core purpose and vision.
2. An organizational structure with too many bureaucratic obstacles and processes, which obstruct decision-making, execution and a sense of urgency.
3. An absence of consistent and contextual communication throughout the organization.
4. An absence of accountability throughout the organization that breeds complacency and obstructs productivity and growth.
5. A high RC Factor, which is a resistance to change.
There’s also a fundamental principle subscribed to by many in determining whether or not individual or collective change is required. It’s when the pain of staying the same becomes greater than the pain required to change. In the case of an organizational transformation, there’s one fundamental requirement that is not optional. It’s a culture of leadership that’s not afraid to take the risk of changing, because they realize the risk of not doing so is greater.

What I want to reinforce to the membership of the Society with this article is that you have that kind of leadership in place. It was clear to me from the outset of that first meeting, where the Board confronted all of that data, that they made a conscious, committed and consensus decision to begin a planning process that would result in an organizational transformation. They did so because of the primary reason that attracted me to the Society in the first place: a unique culture that really cared about the profession, about the members and about the future of the organization. Trust me when I say that all of the emotions that come with such a decision were in play: fear, anger, anxiety, and stress along with excitement, enthusiasm and an eagerness to get on with the process.

As a result, over the last two years, the Board of Directors (as it’s now called), led by your President, Marcene Taylor, has worked tirelessly to address the 5 obstacles to transformation noted herein. Most organizational transformations take anywhere from 3-5 years. Since that October 2015 meeting, with the appointing of a Strategic Planning Committee by the Board, more was accomplished over a shorter period of time (1.5 years) than any group I’ve ever worked with. It all came together at the ‘Annual Meeting’ July 2015, in Tampa, FL, when you voted overwhelmingly to support the transformation of the ASPE.

The work by that Strategic Planning Committee and the Board of Directors continued forward to what is now called the Annual Summit, this last year in Denver. With the introduction of the core values, mission and vision, along with the new organizational branding, what a difference in enthusiasm, tone, education, fellowship and recognition! When the planning process began, membership was declining year on year. Now, as evidenced in the last edition of Estimating Today, membership is growing again.

However, much work is left to be done. The second phase of the planning process began this past week at a meeting of the Strategic Planning Committee of the Board in Nashville. This phase will see the planning process move from a compartmentalized to a more holistic approach, bringing all of the important organizational components together (people, process, data, objectives, challenges) under the same core purpose and vision. The Society is so far ahead of where it was last year at this time in every respect, from finalizing plans for the Annual Summit in Pittsburgh, to continuing the development of every operating segment of the organization. As Marcene noted in the last edition of Estimating Today, it’s time to have a bigger vision for where the Society is headed.

In my previous life, I worked in an organizational culture that (at the time) was second to none. I was mentored by Sam Walton, arguably one of the greatest entrepreneurs in history. I retired after almost 30 years, and since then, I’ve yet to encounter a culture that was even close in terms of members that cared as much about the profession as they did about making a living, as much about their peers as they did about their clients, and as much about the fellowship to which they belonged as they did about their families; until I encountered the ASPE.

As I conclude this article, let me say that at last year’s Annual Summit, I was honored to receive an honorary membership. I will remember that day in perpetuity because it was a such a complete surprise, and I felt so very privileged. I can’t remember feeling that way on the last day of my previous life.

In my opinion, that says everything about the Society, its Culture, and its Leadership!
ASPE Bid Simulation Road Show

ASPE Chapter #78 - Brew City took their Bid Simulation on the road ... all the way to Warroad, Minnesota upon invitation from Marvin Family of Brands, where their corporate offices are located. We presented at the Marvin corporate training center to their commercial sales group. Typical to all Bid Simulation experiences, it was eye opening to this group of 20 and provided exposure to the American Society of Professional Estimators all over the country. Look out upstate New York, Louisiana, Missouri, and Maryland Chapters; you may be asked when your next meeting will be held.

Brew City held their Bid Simulation at their April meeting which was held jointly with the Milwaukee AIA Chapter. Kahler Slater Architects hosted the event in their large conference / training center for (6) teams. These teams consisted of construction related people from architects to subcontractors to contractors to suppliers. Everyone dug in and found themselves completely outside of their box in the proverbial war room setting. One team ate the bid bond, one team was late turning in their bid, one forgot to list their addendum. This led to lively discussion as to the acceptance of the late bid, purpose of the bid bond, what is a performance and payment bond, why does the bid form require listed subcontractors, why a bid breakdown is required at the time of bidding, how alternates are so time consuming during the bid time, and a distraction from the base bid and how clear and concise bids are needed listing the Job, specifications, addendum, tax included and only exceptions.

Marvin Windows Representative Bruce Peterson was in attendance and was ecstatic with this hands-on learning experience and asked if Brew City would take it to Marvin HQ. We secured (3) willing ASPE members to take a few days off from their daily grind and share this experience. Chris Rozof, CPE, Scott Reimer, Brew City Treasurer, and Deanne Goodlaxson, CPE carpooled for (6) hours to get on the corporate jet for the remaining 355 miles of the 650-mile trip. PDF files were sent ahead to the training center of the project manual, plans, bids, bid tab sheets and were printed in advance to be available for the training participants. We then arrived and organized the room, setting up the bid tables and computers that we brought along for the spreadsheet entering experience. The presenter’s reward was to see first-hand a window manufacturing facility in production. We were able to see the entire production of wood windows from raw lumber to cladding with a side show of the round top process, too. It was fascinating to learn how many times a window is touched, emphasizing the understanding of costs.

Every participant in the training session was engaged. Most had only heard of the “war room” and enjoyed the full exposure to what their clients go through. Their take away was amazingly similar to the Brew City experience down to the importance of not eating your bid bond. We had gone in wondering why a window manufacturer would think this pertinent to their sales staff and were quickly reminded that education of your client is key in being able to serve them. This experience supported their understanding and knowledge of their clients and how to better write their proposals to be “noticed” on bid day and used for the project.

ASPE’s National Education Committee (NEC) is working on a new text book that will culminate with the last Chapter entailing a complete Bid Simulation. The Bid Simulation experience provides the tremendously important hands on experience to expose and train people in not only one of the most intense parts of an Estimator’s job, but that of the livelihood of the construction industry. ▲
Welcome to Our New Members

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<thead>
<tr>
<th>NAME</th>
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<tr>
<td>Mike Popovich</td>
<td>City College of San Francisco</td>
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<td>Gladys Paloma De La Paz</td>
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<td>Juan Carlos Quezada</td>
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<td>Keegan Sisney</td>
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MEMBERSHIP CLASSIFICATION COUNT

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Friday, June 29
Awards Dinner
Wyndham Grand

Celebrating ASPE:
Society and Industry Awards
Presented after Dinner

Saturday, June 30
President’s Party
PPG Aquarium
TECHNOLOGY DAY • THURSDAY • JUNE 28

7:00 – 8:00  Breakfast
8:00 – 9:30  Conference Welcome Keynote: Mark Breslin
9:30 – 10:30  Quantity Surveying: Introduction
10:45 – 11:45  Quantity Surveying: Architectural + Structural
12:00 – 1:00  Quantity Surveying: MEP
1:00 – 2:00  Lunch
2:00 – 2:30  Tech Tools 1: DroneDeploy
2:30 – 3:45  RACI: Taking a Project from Conceptual Estimate to Completion: Brian Wright, CPE
4:00 – 5:00  Tech Tools 2: Trimble
5:00 – 5:30  Tech Tools 3: iPlan Tables

PROFESSIONAL DEVELOPMENT DAY • FRIDAY • JUNE 29

7:00 – 8:00  Breakfast
8:00 – 9:00  Strengths Finder: Brent O’Bannon
9:30 – 10:30  Building a Succession Plan: Scott Lesnick
10:45 – 11:45  Mentoring Your Replacement: Scott Lesnick
12:00 – 12:30  Demonstration
12:30 – 2:00  Lunch: Keynote: Evans Nwankwo, CPE
2:00 – 4:30  Improv Skills for Workplace Communication + Teambuilding: Steel City Improv
6:00 – 6:45  Cocktail Reception
6:45 – 10:00  Awards Dinner: Celebrating ASPE

SOCIETY BUSINESS DAY • SATURDAY • JUNE 30

8:00 – 9:00  Breakfast
9:00 – 10:00  Fiduciary Responsibility in Estimating: Ujjval Vyas
10:15 – 11:15  Closing Keynote: James Benham
11:30 – 12:30  State of Society Address: Board of Directors
12:30 – 1:30  Lunch
1:30 – 2:30  Best Practices in Chapter Leadership
6:00 – 7:00  Shuttle Service to President’s Party
7:00 – 11:00  President’s Party @ PPG Aquarium
A Day in the Life of an Estimator: Part 2

I pulled into the office parking lot bright and early this morning, knowing what kind of crazy day I had in store. I thought to myself, “6:30 am isn’t too bad. There’s not much traffic. I snagged a good parking space; and best of all, the phone won’t be going crazy … YET.”

The hustle and bustle of a competitive Bid Day is not much different than a negotiated project Bid Day. You need to contact all of the subcontractors and vendors providing scopes of work identified from the Project Manual Table of Contents. You need to periodically follow up with subcontractors to inform them of issued Addenda. And you need to ensure they will provide not only a proposal but a reasonable price in advance of when the Bid is formally received by the Owner.

All of this happening in the last 4 weeks since the Pre-Bid Conference, in addition to quantifying and pricing your self-performed work and General Conditions and ensuring that the other participating estimators understand their job during Bid Day. Don’t forget about the Bid Form, Bid Bond, Schedule of Alternates, and Unit Prices that need to be coordinated on Bid Day. With a negotiated bid, at least you have some time after receiving the bids to compile everything. Hard bid, not so lucky.

There is that ‘little voice’ keeps telling you to not forget about the proposal due Friday at 3:00 pm. You were able to send several emails yesterday to Development, and you noticed you received responses with attachments. “Maybe I won’t be as rushed as I think,” you say to yourself wishfully.

As 7:30 am comes around, everyone is ready to go. The front desk has been notified of who is to receive which bids. The fax/copy machine is full of paper and toner. The five additional phone lines are open and operable. All computers are up and running. The internet is running smoothly, for now. All of the front page scope sheets are located in their appropriate receiving mail slot.

Getting SmartBidNet.com was one of the best decisions we ever made. Contacting the vendors en masse saved so much time from the days of coordinating three sets of drawings, mailing out 3x5 cards, and spending an inordinate amount of time making and chasing phone calls.

As 7:30 am comes around, everyone is ready to go. The front desk has been notified of who is to receive which bids. The fax/copy machine is full of paper and toner. The five additional phone lines are open and operable. All computers are up and running. The internet is running smoothly, for now. All of the front page scope sheets are located in their appropriate receiving mail slot.

The Project Master Estimate Template is being projected in the “War Room” so everyone can see where and how prices are falling in line, in addition to where we have gaps. If we have gaps or holes in the estimate, the responsible person is to make every attempt to contact the appropriate subcontractor or vendor to determine the status and identify when we might expect their price.

There is that ‘little voice’ again telling you to not forget about the proposal due tomorrow and to not forget about the ASPE Breakfast meeting tomorrow morning. One phone call later, and the issue of the breakfast meeting is resolved. I wonder who the guest speaker is going to be?

As 9:00 am rolls around, we received a few calls, a bunch of emails, and a few faxes. We have about 15% coverage for all the scopes of work. No worries yet; the bid is not due until 2:00 pm. And best of all, it’s due in electronic format. Lunch has been ordered. So far an uneventful Bid Day.

The Pre-Bid meeting several weeks ago had seven General Contractors interested in the project. Two dropped out, taking us down to five interested. And I just received an email from one of our vendors that two more GCs just dropped out, taking us down to three. Our Chief Estimator has always told me to stay with the initial strategy and not to change course at the last minute since you never know how valid the information you’re receiving may be. “Good point,” I think. “Stay the course.”
So far so good. I am a little concerned that we have not received any pricing for machine excavation and the structural steel material. So, being the conscientious Senior Estimator that I am, I call up the respective vendors only to find out that two of the excavators are not bidding and only one steel fabricator responded they would be bidding. Cleo Hooper, our favorite structural steel subcontractor assured us that they would have a price to us by the time initially requested, 1:30 pm. The remaining machine excavator, Miller Excavation, is a subcontractor I am not as familiar with, but they have provided pricing to us before.

My warm fuzzy feeling for the machine excavation portion of the project just went away. I ask Morris, the estimator in charge of that scope, “what’s the deal with the excavators?” “Everyone is busy; Miller said he would be getting unit prices to us before noon.”

In a slightly panicked tone, I indicate, “who’s going to be determining the quantities? Morris, if you are, you better get on it right now. Let’s look at the magnitude of the machine excavation before proceeding.”

After a tense 15 minutes of review of the plans and specifications, we all agreed that unit prices would be fine. The building is being built on a prepared building pad, so not much significant bulk excavation. I suggest to Morris that he contact the other two machine excavators and see if they can enlighten us on the scope. “I’ll give it a shot,” Morris says.

Lunch arrives: more faxes; more emails; more phone calls. The Estimate Master Spreadsheet is indicating that we have complete coverage except for structural steel and machine excavation, but it’s just a tad past noon.

Interrupting lunch, I address the group, “Hey everyone. After you finish eating, start contacting vendors that have not responded with their price. I want to make sure we have good coverage. With only two other GC’s bidding on this project now, we need to ensure we have a good number going in,” I state in a forceful, yet dignified manner.

That ‘little voice’ in my head reminds me (again!) to not forget about that proposal due tomorrow.” What did Sheryl say about an outline of the project price? That’s easy to put together; I’ll use the UniFormat Template we always use. UniFormat will give the Owner a cost breakdown by major building assembly or system. Substructure, super-structure, building envelope, etc. That will be my Exhibit A on the proposal.

Morris interrupts my train of thought, “Hey Curtis, we just got a lump sum price for machine excavation from Brown Brothers.” My comfort factor just improved two notches. I ask Morris, “Who are the Brown Brothers. Have we ever used them before? They don’t sound familiar.” “We’ve had them bid a couple of projects. They’ve been around for a few years mainly doing highway work, but they should be okay,” Morris informs me. “Have them quote us a price for a Performance and Payment Bond, just to make sure. If their bond price is too expensive, keep working on the quantities and use the unit prices from Miller when they come in.” I tell Morris. So much for warm fuzzy feelings.
A Day in the Life of an Estimator ... continued

We’re getting closer. I take a look at the Project Estimate Master Template in the War Room. Looks like the only price remaining is the structural steel. All of the Unit Prices are complete. The Alternates are falling into place. Morris gets my attention and gives me a thumbs-up as he hangs up the phone. “Excavation is good to go,” Morris exclaims. “I’m not too sure what that means, but Morris has been doing this for 20 years and I absolutely trust his judgment,” I think to myself.

Roberta, our Estimating Admin, hands me the proposal from Cleo Hooper from Midwest Steel. I’ve always been amazed at the amount of detail Cleo provides. Eight pages of detailed structural steel and miscellaneous steel quantification and a lump sum price. There is no doubt in my mind that Midwest Steel has included everything needed for this scope of work. If I recall, seven or so years ago when I first started in estimating, it was Cleo Hopper that sat me down and gave me a two hour education on structural steel. I learned more in two hours then I ever learned in school, and I had an entire course on Structural Steel Construction.

I enter Midwest Steel’s price into the spreadsheet, and we now have a complete price. $10,420,000. Falling right in line with our preliminary “ballpark” number for an 80,000 square-foot facility with some high end interior improvements.

I go ahead and complete the Bid Form, except price, with all its unit prices and alternates, waiting a few more minutes for the final price to get entered in the Bid Form and Bid Bond. Allan Holmes, our CFO comes in to see how things are going and to electronically sign the Bid Documents as required by the Bid Instructions. Allan has been doing this for over 40 years and knows everyone in the market as well as pricing. He asks a few pointed questions, looks at the electronic spreadsheet and states rather loudly, “You guys don’t know how good you got it. No more green-sheets and ten key for you ... and electronic delivery of a Bid.” We all look at him with a bit of a confused expression. Green-sheets? Ten-key?

Allan turns to me, “Hey, Curtis, are you sure about this steel price from Midwest? It looks rather high. Are they furnishing and installing or furnishing only?” I answer very cautiously, “They are furnishing and installing.” Allan, with a grin on his face, states, “Then why do we have $82,000 plus labor burden for installing structural steel and miscellaneous steel erection in the GC self-perform section of the spreadsheet?”

A few keystrokes later and with a rather embarrassing look on my face, our price is now $10,301,100. Allan says go with $10,300,000 and see how it goes. One last review of the spreadsheet with the estimating team and it’s ‘thumbs up’ all around. One last look at Allan, who still has that grin on his face, and he says, “Send it!” 1:55PM, with time to spare.

At precisely 2:30 PM we get an email from the Owner thanking everyone for their time and effort in putting together prices and submitting proposals and an attachment with the title Bid Breakdown.

<table>
<thead>
<tr>
<th>Company</th>
<th>Price</th>
</tr>
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<tbody>
<tr>
<td>Universal Construction</td>
<td>$8,890,000</td>
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<tr>
<td>Titus Construction</td>
<td>$10,300,000</td>
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<tr>
<td>Central Contracting</td>
<td>$10,381,000</td>
</tr>
</tbody>
</table>

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BUILDING RELATIONSHIPS SINCE 1913
In Memory …

Jerry Lee Hackleman, CPE (1951 – 2018) – Central Plains Member-At-Large

As deaths of friends, loved ones, and colleagues often do, it gives us a reason to think back on our interactions and to remember the things we admired most about them. Jerry had no shortage of admirable qualities.

My visit to southwest Missouri in April of 2012 wasn’t officially a chapter visit, but Jerry welcomed me with open arms. He invited me to make a presentation about ASPE to the Springfield Contractor’s Association, on whose board he served at the time. Jerry was a veteran, career oriented Estimator, serving as President Emeritus and Chief Estimator (CPE) for 20 years of Dewitt and Assoc., Inc. In addition to being an active ASPE member and a dedicated CPE, he served ASPE on the national Certification Committee for many years, but he also was President and VP of the Springfield Contractors Association, a Board Member and VP for Springfield Chapter of CSI, Board Member for City of Springfield Building Trades Exam and Certification Board, and held numerous other professional memberships.

I’ll always remember Jerry as a quiet, thoughtful expert on construction estimating. He wasn’t flamboyant, loud, or boastful – he was an Estimator’s Estimator, a humble, old-school kind of professional that you had no choice but to respect.

For me, the social aspect of ASPE has always been the most valuable member benefit. Sure, we become better estimators because of our memberships, but we also become connected to some really great people – people like Jerry Hackleman and many others, who share their wisdom, experiences, and wonderful qualities with their brother and sister Estimators, making us better Estimators and better people. I will miss Jerry and the others, and hold their memories fondly, and will continue to be grateful for the ways in which they enriched my life, both professionally and personally.

By Daniel G. Frondorf, CPE, CDT
Chapter 38 - Southwestern Ohio + CP Governor 2009-2013

Jerry was a very modest man with a wealth of knowledge and experience. He had a tireless work ethic. He was a mentor to many while also a trusted advisor for many owners and architects. He was the sole reason I began a career as an estimator and encouraged me to join ASPE and become certified as a CPE. He believed strongly in ASPE’s education and certification programs and worked to infuse the ethics espoused by ASPE into the other organizations in which he participated. I believe he impacted more people than he would ever admit or than he was aware of. Chatting with mutual friends there are several of his colleagues who have said they often reflect before making decisions and ask, "What would Jerry do?" I know Jerry enjoyed the friends and acquaintances he made over the years which led me to reach out to the SBO to join myself.

By Jeff Jones, CPE
Central Plains Member-At-Large

Jerry and I met as members of the Certification Committee, both serving several years during which we established a good friendship. Jerry would quietly and respectfully sit and listen to all opinions and ideas concerning committee business, and then share his thoughts. The soft-spoken manner was always there, with a slight smile to boot.

Jerry was not afraid to confront the tough decisions and knew the art of careful consideration and timely decisions in the best interest of all parties. That is a respected quality exhibited in a professional manner. There was no doubt that Jerry was an estimator that truly loved his work. This was exhibited by his success in the construction industry and further the success of his company.

This is my salute to Jerry: business associate, estimator, committee member, and fellow CPE. You will be missed but never forgotten. Thank you, friend, for those memories.

By Dan Ergle, CPE
Chapter 14 - Atlanta

Jerry and I served together on the ASPE Certification Committee for several years. I remember his quiet, deliberatedecision making process, and his friendly demeanor. He took his duties seriously, and was the kind of Estimator that the Certification process was intended to recognize.

By William (Bill) Manfredonia, CPE
Chapter 26 - The Garden State
In Memory ... continued

Kevin R. Miller, Ph.D. (1968 – 2018)
Chapter 51 – Great Salt Lake

On Friday, March 16, Kevin Reed Miller was welcomed back to his heavenly home at the age of 50 years.

Dr. Miller taught in the Construction Management program at Brigham Young University for nearly 20 years. He taught Estimating at ASU while working on a Ph.D. and then taught at the University of Florida before returning to teach at BYU on a tenure track. He loved technology and felt that the use of technology was the best way to advance the management of construction.

Before becoming an educator, Kevin worked for Layton Construction in their Estimating department. He was a self-described technology and computer nerd. He became an expert on Timberline Estimating (now Sage Estimating) and taught seminars and consulted with other companies to help them in their estimating. He was an early adopter of On-Screen Take-off software. For the past several years, Kevin worked to develop BIM estimating. He used Revit and Navisworks to generate estimates in the Pre-Construction class he taught.

Kevin was the same person at all times. He didn't bring attention to himself and didn't care for the formalities of the university. He was focused on getting the work done and not so concerned about fashion or political correctness. He would bend over backward to help students who were trying their best yet were struggling to understand some difficult concepts; however, typical responses to students who came in at the last minute to beg mercy for missed assignments was, “Don’t worry, class is always better the second time.” To those students who wanted exceptions or had lame excuses he would say, “I know your mom thinks you’re special, but she’s not here.”

Having a member from academic circles on our Education Technical Committee was of prime importance in providing valuable insight and knowledge for our programs. Although he was no longer an active member of ASPE, Kevin served with distinction as the Southwest Region representative on the Education Board/Education Committee for several years (2003-2008) including 3 years as Chair. During Kevin’s tenure, the Committee was charged with developing and administering the Estimating Academies conducted during the annual Convention and for other construction-related organizations. His input and guidance in selecting appropriate topics for the curriculum and finding skilled instructors to teach those classes brought further recognition for the Society and its Mission in serving the construction industry. In recent years, Kevin continued to offer his advice and counsel concerning the needs of students pursuing Construction Management careers and trends among educators to provide the best training possible in nurturing the future estimators and project managers.

Kevin will be sorely missed by his family, friends, the BYU community, and a large extended family who all adore him.

By Frank E. Young, FCPE
Chapter 4 - San Diego

PROFICIENCY PROVEN

You wonder if your future employee has all the skills and knowledge they claim. How can you be certain he or she knows exactly what they are doing?

The applicant may have some field experience and possibly even a few years of estimating experience. Without documentation or credentials, how do you validate their resume?

Consider a prerequisite for applicants. Request they complete the ...

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Owners: Set the Foundation with a Better Design Agreement

Tim Gibbons on behalf of ConsensusDocs

About the Author:
Building on his first career as a licensed architect, Tim Gibbons has focused on construction law and related topics in his law practice. Currently a shareholder at Chambliss, Bahner & Stophel, P.C., Gibbons is a member of the firm’s Litigation and Business Sections and is Chair of the Construction Group. He is also a fellow in the Construction Lawyers Society of America, as well as a member of the American Arbitration Association’s Construction Industry roster of neutrals.

Often the first contract in a construction project is the contract between the ultimate owner of the project and the lead design professional – the architect or engineer - which therefore sets the foundation for the entire project. Architects and engineers often suggest their preferred contract based upon an industry standard construction contract that becomes a legally binding plan. That might not be the best contract for an owner. Before signing a contract, consider carefully some fundamental questions.

**Should an owner expect construction documents produced by the design professional to be sufficient to bid and build the work?** It might surprise you to discover that standard contracts produced by the association representing design professionals do not include this requirement. ConsensusDocs standard contracts, which include the largest owner groups in the construction industry, explicitly require the “construction documents [to] completely describe all work necessary to bid and construct the project.” The ConsensusDocs long form (240) and short form (245) standard design professional agreements with the Owner both contain such language. The American Institute of Architect (AIA) forms do not specifically require drawings and specifications to be fit for the purpose of building the project. AIA forms include a standard of care that the architect’s services are to be “consistent with the professional skill and care ordinarily provided by architects practicing in the same or similar locality under the same or similar circumstances.” But that standard would be required of professionals in any event.

**Should an owner expect explicit avoidance of conflicts of interest?** The ConsensusDocs 240 and 245 state directly that “conflicts of interest shall be avoided or disclosed promptly” and further require the designer to warrant that it has “not and shall not pay nor receive any contingent fees or gratuities” that might result in preferential treatment.

**Should an owner expect regular field visits to be included as a basic service?** ConsensusDocs contracts take a practical approach to site visits. They provide blanks to quantify either a set number of visits or a frequency of visits, and require the designer to report “promptly” to the owner, in writing, after each visit. The current AIA forms have the same somewhat vague construction inspection requirements as earlier versions. The architect is required only to visit the site at “intervals appropriate to the stage of construction,” to be only “generally familiar with the progress and quality” of the work, and “to determine, in general, if the Work . . . when fully completed, will be in accordance with the Contract Documents.”

**Should an owner be able to use design documents on a project caught up in a dispute or for their later renovation projects?** Many owners prefer to own the intellectual property rights of design documents. For example, owners of projects incorporating proprietary equipment or spatial arrangements involving competitive advantages need to control the intellectual property rights in the design, and to allow use of the drawings and specifications for additions or modifications in the future. ConsensusDocs provides a balanced approach for the owner to use design documents for its immediate project and the opportunity to negotiate further rights for other projects, provided payment is made. The AIA continues to give the architect carte blanche ownership of all intellectual property in the “Instruments of Service” (Article 7 in the B101). Those protections may not serve the interests of owners.

**Should an owner expect to use and transmit documents electronically?** The ConsensusDocs 200.2 Addendum and 301 contain detailed considerations for electronic transmission protocols, including precise descriptions of the types of hardware and software to be used. The 2017 AIA documents now require parties (in § 1.3.1 of the B101) to use only AIA contract documents, specifically AIA E203 and AIA G202, in connection with transmission of digital information and Building Information Modeling. Otherwise all sharing of electronic information is at the using party’s sole risk. Owners will need to eliminate this unfair risk-shifting provision if they elect to use other documents, such as ConsensusDocs, for electronic protocols.
Owners: Set the Foundation with a Better Design Agreement (continued)

Owners are too often confronted with disputes over construction. Rather than being potentially whipsawed in multiple disputes, owners need to be free to join all the necessary parties in a single matter, be it arbitration or litigation. ConsensusDocs provide for joinder of all parties necessary to resolve the dispute. The AIA joinder provision continues to require the consent of some parties to be involved in arbitration. If a necessary party refuses to be involved in an arbitration, owners are faced with the dilemma of having either multiple disputes or being forced to choose litigation as the only means to have all the parties in one forum.

The common denominator of failed construction projects is a lack of communication. Contracts should not just allow, but actually require the parties to resolve disputes through positive and direct communication. ConsensusDocs adopts the current trend of requiring the parties to meet informally and attempt an amicable resolution prior to mediation or other final dispute resolution. Instead of informal direct negotiations, AIA contract documents appoint an Initial Decision Maker (IDM), which is almost always an architect. This role has been critized as putting architects in a difficult position, since they are employed and paid by the owner but must not show partiality in deciding claims. And a party’s failure to timely disagree with the architect’s decision may result in waiving claims. The new AIA contracts complicate the ability of a party to dispute an IDM’s decision.

In conclusion, owners should give more critical analysis in creating the contractual foundation with their design professional as the first contract on the project. ConsensusDocs provides project-centric standard design contracts. The AIA contract documents are perceived to favor design professionals’ interests. Some call them advocates documents instead of industry-wide standard documents. One observer has suggested that an architect’s proposing an AIA contract may compromise their objectively, because it favors the architects’ interests over the owners. ▲
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How to Estimate the Cost of a Building Exterior Enclosure at a Conceptual Level

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How to Estimate the Cost of a Building Exterior Enclosure at a Conceptual Level

SECTION 1: INTRODUCTION

The purpose of this paper is to give the reader an understanding of how to prepare an estimate of the cost of an exterior enclosure with the limited information that is typically available at the time a conceptual estimate is being prepared. At the conceptual level, information is limited, and often times no drawings are available. This paper will discuss both situations of having conceptual floor plans, and also utilizing ratios of building gross areas to derive quantities when no drawings are available. The focus will be on the above-grade exterior wall of the building, and will not cover the roof and/or any basement wall construction. This information is based on an example of the exterior wall for a medical office building, though most of the information and methods discussed will be relevant for use on other types of buildings. The CSI divisions utilized in the examples utilized are listed below; however, these divisions will vary by project and be based mostly on the selection of the exterior wall materials.

CONSTRUCTION SPECIFICATIONS INSTITUTE

MAIN
Division 03 Concrete
03 40 00: Precast Concrete
Division 05 Metals
05 10 00: Structural Metal Framing (Misc. Supports)
05 40 00: Cold-Formed Metal Framing
Division 07 Thermal and Moisture Protection
07 27 00: Air Barriers
Division 08 Openings
08 40 00: Entrances, Storefronts, & Curtain Walls
08 80 00: Glazing
08 90 00: Louvers
Division 09 Finishes
09 20 00: Plaster and Gypsum Board

BRIEF DESCRIPTION

The exterior wall of a building is often a high priority issue as it holds a significant portion of the overall building costs, and also is the overall image or first impression of the building. Accurately representing these costs and defining the parameters early on in the estimating process is critical to maintaining a project budget through design.

This paper will discuss two scenarios for estimating an Exterior Enclosure at a Conceptual Level. In both scenarios, a ratio of materials will be utilized in order to calculate the total cost of the exterior enclosure. This assumes that no elevations and/or quantifiable renderings are available at the time of this estimate.

1) Conceptual floor plans or stacking diagrams are available and can be used for take-off of building perimeters.
2) No floor plans or drawings are available and ratios of exterior wall to building gross square footage (GSF) must be utilized.
Section 2: Types and Methods of Measurements

Exterior walls should be taken off by the linear feet of the perimeter and multiplied by the height in order to derive a total square footage. Taking quantities strictly from elevations of a building can result in missed quantities. For example:

Here you can see if the takeoff was done by elevation (the red line), the "curve" or any undulations, pop-outs areas, or setbacks within the exterior shape would be overlooked.

Floorplan layouts often vary for some or all levels of the building. In this case, it is best to do the takeoff for each floor independent of the others and multiply the perimeter of each floor by the height of that given level. By adding up all of the levels of the building you will get the total raw takeoff of the exterior wall square footage (EWSF).

Carefully consider any spaces which may not yet be included within conceptual floorplans or stacking plans such as mechanical penthouses, screenwalls, etc. Assumptions will need to be made based on similar project types to include both the building area and exterior wall area for these elements.

The floor to floor (FTF) height will vary by building type and is often constrained by any potential clearance requirements for equipment or other objects within the building. Benchmark information and coordination with the Owner and Architect should drive the assumed FTF height for each floor. In many cases, the FTF is higher for the 1st floor or Lobby floor than on upper floors.

Soffits are taken off by area and are calculated by utilizing floorplans or areas by level to find overhangs. A simplified example:

- Level 1 of Building ABC is 40,000 GSF
- Level 2 of Building ABC is 45,000 GSF
  * This indicates there must be at least 5,000 sqft (45,000 minus 40,000) of overhangs/soffits below Level 2.

In many cases, soffits are accounted for by utilizing an allowance of area for these conditions and/or included in a waste factor to the raw exterior takeoff. Waste factors should also be included when utilizing conceptual drawings to allow for design evolution moving forward.

A sample sketch stacking diagram and take-off of a 7-story Medical Office Building is included on the following pages.
When no drawings are available, overall exterior quantities must be derived from a ratio of the overall building GSF compared to the exterior wall square footage. Wall ratios should be taken from previous benchmarked projects and similar building types. The higher the ratio, the less efficient the shape of the building is. Buildings with large amounts of “ins” and “outs” as well as skinny / elongated buildings will tend to be less efficient.

The exterior wall ratio is calculated by the total exterior wall quantity (including screenwalls, penthouses, soffits, overhangs, etc.) divided by the total building GSF (including all mechanical spaces, shelled spaces, etc.).

Most building types will fall somewhere in between or near a range of 0.35 (more efficient like a developer office building) to 0.60 (less efficient). In this discussion, efficient is simply an analysis of how many sqft of exterior wall it takes to clad a specific building. Knowing this information allows us to target potential cost savings and/or identify budget issues as the process moves forward. Without doing any actual budgeting, you can quickly understand that an office building with a 0.55 exterior wall to building area ratio will be less cost effective than other similar buildings of that type, and may throw a red flag early in the process that changes may need to be made and/or explain why the overall project cost may not be in line with comparable projects.

The exterior wall ratio typically will assume that all exterior components are included (walls, soffits, screenwalls, etc.). If not, these items will need to be accounted for in addition to the ratio.

BENCHMARK RATIO CALCULATION

**BUILDING A:**
200,000 sqft and 100,000 exterior wall sqft
100,000 EWSF / 200,000 GSF = 0.50

**Building B:**
150,000 sqft and 60,000 exterior wall sqft
60,000 EWSF / 150,000 GSF = 0.40

**Average of Above = 0.45**

**Concept Budget Building GSF = 255,000 sqft**
**Exterior Wall to Building GSF Ratio = 0.45**
**Total Assumed Exterior Wall Quantity = 114,750 sqft of Exterior Wall**
Section 3: Factors That May Affect Takoff, Pricing, Etc.

There are a number of factors that affect the pricing of an exterior wall.

The primary factor to the pricing is the material selections. Material selections, quantities/ratios, and unit pricing of each material are made based on a combination of several potential factors:

- **Owner and/or Architect Preferences** – it is always best practice to confirm and discuss your assumptions with the project team whenever possible.
- **Building Type**
  - Examples:
    - Hospitals require windows for patient rooms, but would be a “solid” material in various other locations such as precast, metal panels, stucco, etc.
    - Many high-rise office buildings are nearly 100% curtainwall
- **Geographic Location and Availability of Products**
- **Local Workforce** – availability, labor unions, etc.
- **Adjacent or Nearby Building Facades** – potential of needing to match or complement such elements
- **Local Codes and/or Regulations**
- **Ballistic Requirements**
- **Building Shape/Configuration**
- **Access to the Building** – for installation
- **Fire-Resistant Requirements**
- **Hurricane or Wind Ratings**
- **Sustainability Requirements**
- **Small quantities vs. large quantities**
  - Smaller quantities of certain materials may result in a higher unit cost due to setup costs, overhead expenses, etc.
- **Rooftop screenwalls**
  - Screenwalls utilized to hide equipment are often overlooked and need to be considered in the exterior wall quantities.

Once material selections and/or assumptions have been made, utilizing the same general criteria above you will need to derive a ratio for each type of material.

For this example, the project is in Florida and has wind rating criteria that must be met. Through discussions with the Owner and Architect, reviewing benchmarked projects, and considering the multiple factors listed previously, we have come up with the following ratio of exterior materials:

40% Curtainwall: \[114,750 \text{ sqft} \times 0.40 = 45,900 \text{ sqft}\]
50% Precast: \[114,750 \text{ sqft} \times 0.50 = 57,375 \text{ sqft}\]
8% Stucco \[114,750 \text{ sqft} \times 0.08 = 9,180 \text{ sqft}\]
*Primarily for soffits and/or screen walls
2% Louvers \[114,750 \text{ sqft} \times 0.02 = 2,295 \text{ sqft}\]
Louvers should be considered for any building that has ventilation or exhaust requirements for anything that is contained within the building footprint, such as mechanical or electrical equipment. This item often requires coordination with the mechanical estimate to confirm the scope is not double-covered and/or overlooked.

Pricing of each material should take into consideration all of the factors listed previously. Knowledge and coordination with local market subcontractor pricing is essential to providing accurate overall pricing for the exterior enclosure. Note, timing of the project and contingencies for any potential escalation should also be considered at this phase of the process.

Also keep in mind that we are pricing the entire exterior enclosure (a full system), so other components to consider in the pricing are:

- Framing & sheathing
- Insulation
- Air / Vapor Barriers
- Caulking and sealants
- Misc. support steel

Each unit price should include a list of assumptions, clarifications and exclusions that provide parameters for how the unit price was derived.

For example - Curtainwall is budgeted at $90/sqft based on the following criteria:

- 7” deep mullions
- Large missile impact rating below 30’, small missile above 30’
- Low-E, laminated, insulated impact glazing (clear)
- 3-coat Kynar finish (or equal)
- Fire-rated glass systems are excluded

Specialty entrance doors such as sliding glass doors, alum/glass entrance doors, revolving doors, etc. should be accounted for within your overall quantity take-off. Assumptions will need to be made on the quantities and types of entrance doors. The estimator should not assume that these costs are included in the overall unit cost of the exterior. For example:

- A pair of 3’-6” x 8’-0” glass entrance doors may cost in the range of $8,000 - $12,000 per pair for the location of the example being used in this document. If a vestibule is anticipated, this cost would double ($16,000 - $24,000), if not accounted for elsewhere within the overall project budget.
- This same area, if assumed to be included in the exterior wall quantity, is:
  3.5’ x 8.0’ x 2 each = 56 sqft
  56 sqft x $90/sqft = $5,040
  (a budget shortage of anywhere from $3,000 to $19,000)
Section 4: Labor, Material, Equipment, and Indirect Costs

At a conceptual level estimate, unit costs are derived from historical data such as benchmarking or using publications such as RS Means, local market knowledge, and/or subcontractor feedback. These unit rates are to include all labor, material, equipment, and overhead costs as evaluated by considerations listed in Sections 3 and 5 of this paper. Labor, material, and equipment pricing all factor into the applied unit rate, but are not typically evaluated individually at this stage in the process.

Section 5: Special Risk Considerations

Escalation – Since conceptual estimates are often a year or more prior to the start of a project, escalation should strongly be considered in either the unit pricing of the estimate and/or as an overall allowance for the total project budget.

Design Evolution/Variance from assumptions – As stated before, the estimator needs to clearly state the assumptions upon which the estimate is based, and include those written assumptions with the estimate. Often including takeoff files and calculations is also a good practice to clearly identify what the conceptual pricing is based on. This is simply a way of documenting what was priced compared to what may be designed later in the process, and help explain variances between estimates.

New Construction vs. Renovation – Renovations often create difficulty for installations and should be strongly considered when making material and unit price assumptions.

Sole Source Products – Most projects are required to provide at least 2 to 3 approved manufacturers for all specified materials. In some cases, single manufacturers can be selected (for various reasons). Sole sourcing of products can often increase pricing due to lack of competition in the market. Sole sources products should be taken into consideration for unit pricing, and unless otherwise known, should be excluded from conceptual pricing exercises.

Project Schedule – The overall project schedule can have an impact on both material assumptions and on unit pricing. Material assumptions should consider long-lead durations which may affect the project timeline. Unit pricing may also be affected based on project schedule. Example would be a requirement for the exterior contractors to work in multiple elevations at the same time or needing to work overtime or premium time hours to maintain schedule durations.

New Construction vs. Renovation – Renovations often create difficulty for installations and should be strongly considered when making material and unit price assumptions.

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Section 6: Ratios and Analysis

Quantities, unit pricing, ratios, and overall costs should be compared to other relevant projects within the area to test and confirm if the information is within a reasonable range.

Notable guideline mentioned previously:

- Exterior wall to building area ratios are typically between 0.35 and 0.60.
Section 7: Sample Takeoff and Pricing Sheets: *This example is utilizing quantities derived from the stacking diagrams, and varies slightly from the previous examples where no floorplans were available.

<table>
<thead>
<tr>
<th>Description</th>
<th>Perimeter (LF)</th>
<th>Area (GSF)</th>
<th>FTF Height (FT)</th>
<th>Area (SQFT)</th>
<th>Exterior Wall To Floor Ratio</th>
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<tr>
<td>Level 1</td>
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Concept Budget Assumptions/Criteria: *Pricing is based on start of Construction date on or before March 2017.

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<th>Pkg. #</th>
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</tbody>
</table>
Stucco – 8% of Total Exterior Wall Quantity
- Fluid applied moisture barrier
- 3-coat stucco system (STO or equal) over metal lath
- Integral color
- Includes PVC trim (no aluminum)
- Minimum reveal dimensions of roughly 4’ x 8’

Curtainwall – 40% of Total Exterior Wall Quantity
- 5”, 7”, & 9” mullions as required for missile impact ratings based on span
- Low-E, laminated, insulated impact glazing (clear)
- 3-coat Kynar finish (or equal)
- Fire-rated glass systems are excluded
- Sunshades are not anticipated.

Precast – 50% of Total Exterior Wall Quantity
- 6” precast panel thickness
- Max 3/4” depth reveals
- White cement-based mix – 1 color
- Sandblast finish
- Plain steel reinforcing

Louvers – 2% of Total Exterior Wall Quantity
- Architectural louvers are included as an allowance of $115/sqft

### ANNOUNCEMENTS

**Developing the Next Estimator**

**2018 Summit: Developing the Next Estimator:** The staff is working diligently to confirm plans and finalize details for the 2018 Steel City Summit; and we are excited to welcome you to Pittsburgh in June!

**Just a reminder regarding Registration fees …**

<table>
<thead>
<tr>
<th>Registration Level</th>
<th>Cost</th>
<th>Start Date</th>
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<tr>
<td>Regular Registration</td>
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<tr>
<td>Late Registration</td>
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If your plans are to join us, you are encouraged to complete your Registration soon!
The Professional Estimator – Not Part of the “What’s In It for Me” Crowd

From my perspective, Members of ASPE are truly a cut above the less motivated individuals who make up a portion of their specific generation. It has been my pleasant observation that those who have made the commitment to become members of ASPE did not do so because they were primarily interested in how membership would benefit them. They are interested in benefiting others, including their employers, their customers, their clients, their fellow estimators, and others involved in the construction industry. This selfless attitude, which I have observed in many of ASPE’s older and younger members is heartening to me as I approach another 5-year milestone in my tenure as an ASPE member. The Professional Estimators I have encountered embrace the core values of ASPE in a way that will preserve the heart and soul of our Society for many generations into the future.

I will be eternally grateful to the seasoned estimator with the general contractor that I began working for in 1971. I was working for that contractor both in the field and in the office for about two years when an estimator colleague invited me to a local chapter meeting of ASPE. In September of 1973, almost 45 years ago, I joined the Denver Chapter because of the quality of the programs, the quality of the individuals who were involved, and because I saw the opportunity to contribute my time and talents to an organization committed to Education, Professionalism and Fellowship, and the improvement of the competitive bidding environment that was then present in the construction industry. I soon discovered, however, that the pursuit of these more altruistic goals and objectives had the residual benefit of molding and shaping my own career and developing my technical, administrative, management, writing and oral presentation skills. Without a conscious awareness of the transformation that was taking place in my life, in retrospect I found that the more I gave and contributed, the more I received in return.

Over the period of nine years, from 1973 to 1982, ASPE continued to grow nationally, and my investment in this organization both at the chapter and national levels knew no limitations. I attended my first National Board of Trustees Meeting in Chicago as a delegate from the Denver Chapter in September of 1974, and subsequently I became involved on the committee charged with hosting the first truly national convention in Denver in January of 1975. Thereafter I helped publish the chapter newsletter, and chaired the chapter program and education committees. I applied for and earned my Certification as a Professional Estimator in 1976 as one of the original class of CPEs. I became Denver Chapter President in 1978 through 1979. This then led to an appointment to the National Education Committee, which in turn led to an election to the Regional Governorship and a position on the National Board of Trustees. While serving as governor, my employer transferred me to Minneapolis-St. Paul, which was outside the boundaries of my region; so in 1981 I seized the opportunity to form a new chapter, Viking Chapter 39. Because I could no longer serve as the Rocky Mountain Regional Governor, my family encouraged me to run for, and I was elected to the office of National President. Thus, in 1982, at the ripe old age of 34, I began serving ASPE as its top elected volunteer. During my two terms as President, some 14 new chapters were formed and the Certification and Standards committees took on new visions.

As I began to take a back seat out of the limelight of the National Organization in the late 1980’s, much of the contacts and goodwill I had experienced provided new opportunities for professional development and growth. I look back with great satisfaction at the progress ASPE was making under its new volunteers and strong leaders and at their own visions for ASPE’s role in the lives of construction cost estimators and the construction industry. In 1990 I was honored to be named National Estimator of the Year; and in 1991, I became a Fellow CPE. That honor came to me almost 27 years ago, and yet it seems like yesterday.

Robert H. Pratt, FCPE
Chapter 5 - Denver
Demand Construction Services, Inc.
bpratt@demandinc.com
In 1982, while I was in the Twin Cities, my career took a turn from estimating project costs for bidding purposes and the pricing of change orders, to my first opportunity to become an expert witness in a case involving the value of the damages suffered on a construction project site due to a demolition accident. My involvement in ASPE, and my Certification and stature as a National Officer of ASPE have been invaluable credentials that have served me well throughout my consulting practice as a Forensic Construction Expert Witness. I have been engaged in over 500 cases, and testified in about one-fourth of those cases. In the other three-fourths of those cases, most of them were settled on the basis of the written reports which served to persuade the parties to settle their case prior to any testimony in deposition or at trial. Thus, whereas my strengths were math and science in my high school and college classes, my involvement in ASPE led to greater companion strengths in writing and speaking in the technical fields of construction.

In recent years I have been actively serving ASPE as its representative on the ConsensusDocs Contract Content Advisory Committee, and serving on the AGC National Contract Documents Forum. Understanding contracts as a construction professional is crucial to a proper evaluation of the risks faced by the various parties to construction contracts. I have also studied and analyzed and taught seminars on the various contracts published by the American Institute of Architects. Now, as an Associate Member of the American Bar Association’s Forum on Construction Law, I had a vision for a book titled “The Forensic Construction Expert Witness – A Guide for Engaging and Presenting Expert Witness Testimony.” The ABA-FCL has embraced this vision, and some two-dozen attorneys and experts have authored chapters and articles for this book, which is now scheduled to be published by the ABA later in the spring of 2018.

In hindsight, the question posed by many - “What’s In It for Me?” will never be answered satisfactorily if that is their limited motive and self-centered incentive for membership in an organization like ASPE. But it is my observation that those Professional Estimators who have actually joined ASPE in recent years are actually motivated by the alternative phrase “What’s In It for Me – the opportunity to Serve Others and Grow Professionally, so that I can be more effective in bringing about positive results for my colleagues, employer, customers, clients, and the entire construction industry.” With that attitude, the future of ASPE looks very bright to me.

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** Examine what is included in the cost Divisions - then add, change or remove to fit your needs

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MONEY-BACK GUARANTEE: cancel anytime and get a full-refund for the unsent issues!
FACES OF ASPE: James Madison, CPE

Chapter 42 - Empire State- Chapter President
Gilbane Building Company – Estimating Executive
Contact: James Madison, CPE: Jmadison1@gilbaneco.com

Best advice I ever received

Best advice I share with young (and not so young) estimators

Chapter goal for 2018

If I wasn’t doing this, I would

22 years ago, the Carpenter Foreman I was working for told me I should combine my educational background in Engineering with my experience in the trades and try my hand as an estimator. I took his advice and will always be grateful.

Strive to be a continuous learner and enhance your sense of curiosity. The best estimators are always interested in learning about new systems and technologies.

Design a Chapter Logo and set up a Scholarship Program.

…be trying to make a living as a high school basketball coach.

Certification Journal: A CPE’s Certification Journal is an important tool that is available (and always at your fingertips)! Take steps to streamline the CPE Renewal process: No more lost certificates … No more hand-written PDU recaps! CPE members have the ability to enter PDUs immediately when earned …

1. Log-in to the ASPE Website and into Your Profile
2. Select: Quick Links (in black tool bar)
3. Select: Certification Journal (located at the bottom of the List)
4. Select: Journal Entries (tab on the right)
5. Select: + Add Entry
6. Enter: Information into the Data Field(s)
7. Select: Submit

If you have attended a meeting or participated in a PDU earning opportunity, record your PDUs today!

SBO Corner
The War Room

Traveling

One of the things that make my job interesting is travel. As my territory spans from Colorado to Virginia and most states north of that, I have the opportunity to travel a lot. As a matter of fact, I recently realized that I have visited 46 of the 50 states.

Unfortunately, when I travel I usually fly in the night before, and then take the next flight out after the meeting. Not the best way to see the country; but if it’s a really cool place, I will try to include a weekend.

Mostly, my travel involves attending a pre-bid conference where they introduce all the players and lay out the specifics of the project. Sometimes it is a jobsite visit to survey existing conditions and do a field estimate because none of the information can be found on plans. But my favorite trip is when we are called in for a post bid presentation to the General Contractor. That gets the blood flowing and the heart racing!

I recently attended the Denver Chapter’s program where the speaker was a General Contractor who lectured about giving presentations. Either a subcontractor to a GC, or a GC to an owner.

I took it to heart and used everything I learned for a presentation I delivered just last week.

As a member of the Education Committee, I will develop a training module about that presentation and submitting it to the Society Business Office so, in the future, other chapters can put on that same program, or one like it.

For now, I will share a couple of the things. First, do not be negative. Meaning, don’t just say “no” to things they are asking you to include. This is a negotiation. Perhaps you can give them the additional mobilization they are requesting in return for the use of their lift.

Conversely, do not over commit. If you don’t have the manpower to put several crews on the project at once, do not agree to it. The project will suffer for it, and the customer will be very unhappy when you are unable to perform as promised. And you can be certain that you won’t be called in the next time.

Hopefully I win that project; we are still working on details. Maybe I will have the opportunity to fly there for the final award. Next time, I will spend the weekend! ▲
ASPE CHAPTER MEETINGS

ARIZONA
Arizona #6
Where: Double Tree Hotel
320 N 44th Street
Phoenix - 85008
Date: 2nd Tuesday; Time: 5:30 PM
Meeting Contact:
Marvin Blau
aspe6treasurer@gmail.com

ARSizona #6
Where: Double Tree Hotel
320 N 44th Street
Phoenix - 85008
Date: 2nd Tuesday; Time: 5:30 PM
Meeting Contact:
Marvin Blau
aspe6treasurer@gmail.com

ARKANSAS
Arkansas #33
Where: Baldwin & Shell
1000 West Capital Avenue
Little Rock - 72201
Date: 3rd Friday; Time: 12:00 PM
Meeting Contact:
Chuck Garrett, CPE
cgarrett@baldwinshell.com

Arkansas #33
Where: Baldwin & Shell
1000 West Capital Avenue
Little Rock - 72201
Date: 3rd Friday; Time: 12:00 PM
Meeting Contact:
Chuck Garrett, CPE
cgarrett@baldwinshell.com

COLORADO
Denver #5
Where: To Be Determined
To Be Determined
Denver
Date: 2nd Tuesday; Time: 5:00 PM
Meeting Contact:
Matthew Rasmussen
mrasmussen@henselphelps.com

COLORADO
Denver #5
Where: To Be Determined
To Be Determined
Denver
Date: 2nd Tuesday; Time: 5:00 PM
Meeting Contact:
Matthew Rasmussen
mrasmussen@henselphelps.com

CONNECTICUT
Nutmeg #60
Where: Back Nine Tavern
245 Hartford Road
New Britain - 06053
Date: Varies; Time: 6:00 PM
Meeting Contact:
Harrison Levy
klevy@petraconstruction.com

CONNECTICUT
Nutmeg #60
Where: Back Nine Tavern
245 Hartford Road
New Britain - 06053
Date: Varies; Time: 6:00 PM
Meeting Contact:
Harrison Levy
klevy@petraconstruction.com

DELAWARE
Delware #75
Where: To Be Determined
To Be Determined
Wilmington
Date: TBD; Time: TBD
Meeting Contact:
Gregory Williamson, CPE
gwilliamson@bondbrothers.com

DELAWARE
Delware #75
Where: To Be Determined
To Be Determined
Wilmington
Date: TBD; Time: TBD
Meeting Contact:
Gregory Williamson, CPE
gwilliamson@bondbrothers.com

DISTRICT OF COLUMBIA
Greater D.C. #23
Where: Jacobs
1100 North Glebe Road, Suite #12
DC
Date: 3rd Thursday; Time: Varies
Meeting Contact:
Maurice Touzard, CPE
mtouzard@gmail.com

DISTRICT OF COLUMBIA
Greater D.C. #23
Where: Jacobs
1100 North Glebe Road, Suite #12
DC
Date: 3rd Thursday; Time: Varies
Meeting Contact:
Maurice Touzard, CPE
mtouzard@gmail.com

CALIFORNIA
Los Angeles #1
Where: The Barkley Restaurant
1400 Huntington Drive
South Pasadena - 91910
Date: 4th Wednesday, Jan.-Dec.
Time: 6:00 PM
Meeting Contact:
Bruce Danielson
lalofasp@outlook.com

CALIFORNIA
Los Angeles #1
Where: The Barkley Restaurant
1400 Huntington Drive
South Pasadena - 91910
Date: 4th Wednesday, Jan.-Dec.
Time: 6:00 PM
Meeting Contact:
Bruce Danielson
lalofasp@outlook.com

CALIFORNIA (CONTINUED)
Golden Gate #2
Orange County #3
San Diego #4
Sacramento #11
Silicon Valley #55

CALIFORNIA (CONTINUED)
Golden Gate #2
Orange County #3
San Diego #4
Sacramento #11
Silicon Valley #55

Golden Gate #2
Where: AIA East Bay
1405 Clay Street
Oakland - 94612
Date: 3rd Wed.; Time: 6:00 PM
Meeting Contact:
Gustav Choto
gchoto@buildingpointpacific.com

Orange County #3
Where: Ayres Hotel
325 Bristol Avenue
Costa Mesa - 92626
Date: 2nd Wed.; Time: 5:30 PM
Meeting Contact:
Tom Smithson
tedwardsmithson@gmail.com

San Diego #4
Where: Varies
To Be Determined
San Diego
Date: 3rd Tuesday; Time: 5:30 PM
Meeting Contact:
Mike Moyers, CPE
michael.moyers@bestinteriors.net

Sacramento #11
Where: Rancho Cordova City Hall
2729 Prospect Park Drive
Rancho Cordova - 95670
Date: 2nd Friday; Time: 12:00 PM
Meeting Contact:
Jared Wright
jwright@filimblduilders.com

Silicon Valley #55
Where: Varies
To Be Determined
To Be Determined
Date: Varies; Time: Varies
Meeting Contact:
Alan Jacobs, CPE
alan.jacobs@blach.com
ASPE CHAPTER MEETINGS (CONTINUED)

**FLORIDA**
Tampa Bay #48
Where: Lee Roy Selmons
4302 W. Boy Scout Boulevard
Tampa - 33607
Date: 3rd Wed.; Time: 6:00 PM
Meeting Contact: Bob Nidzgorski, CPE
bob.nidzgorski@skanska.com

**INDIANA**
Central Indiana #59
Where: To Be Determined
Indianapolis
Date: 3rd Thursday; Time: Varies
Meeting Contact: Noelle Cichy
ncichy@summitconStreetcom

**GEORGIA**
Atlanta #14
Where: Sage Woodfire Tavern
4505 Ashford Dunwoody Road
Atlanta - 30346
Date: 2nd Monday; Time: 11:30 AM
Meeting Contact: Clinton Aldridge
clinton.aldrige@skansa.com

**LOUISIANA**
New Orleans #9
Where: To Be Determined
New Orleans
Date: TBD; Time: TBD
Meeting Contact: Chuck Hesselbein, CPE
chesselbein@baldwinshell.com

**MAINE**
Maine #37
Where: Woodard & Curran
41 Hutchins Drive
Portland - 04102
Date: 1st Wednesday; Time: Varies
Meeting Contact: John Brockington, CPE
jbrockington@woodwardcurran.com

**MARYLAND**
Baltimore #21
Where: To Be Determined
Baltimore
Date: Varies; Time: Varies
Meeting Contact: Ed Cluster, CPE
eccluster@phoenix-eng.com

**MASSACHUSETTS**
Boston #25
Where: Maggiano’s Little Italy
4 Columbus Avenue
Boston - 02116
Date: 3rd Wed.; Time: Varies
Meeting Contact: Mario DiCesare
Mario.DiCesare@aecom.com

**MICHIGAN**
Detroit #17
Where: Visit www.aspe17.org
To Be Determined
Detroit
Date: Varies; Time: Varies
Meeting Contact: Mel Oakley, LCPE
oakley.me@gmail.com

**ILLINOIS**
Chicago #7
Where: Barbakoa Tacos & Tequila
1341 Butterfield Rd
Downers Grove - 60515
Date: 3rd Thursday; Time: 6:00 PM
Meeting Contact: Bob Svoboda, CPE
bsvoboda@ccsdifference.com

**IOWA**
Quad Cities #71
Where: To Be Determined
Davenport
Date: Varies; Time: Varies
Meeting Contact: Keith Parker, CPE
keithparker@circlebco.com

**OLD FORT #65**
Where: To Be Determined
Fort Wayne
Date: Last Thursday; Time: Varies
Meeting Contact: Phillip Salisbury, CPE
psalisbury@blundall.com

**NEW ORLEANS #9**
Where: To Be Determined
New Orleans
Date: TBD; Time: TBD
Meeting Contact: Chuck Hesselbein, CPE
chesselbein@baldwinshell.com

**ORLANDO #50**
Where: To Be Determined
Orlando
Date: TBD; Time: TBD
Meeting Contact: Danny Chadwick, CPE
dchadwick@bellsouth.net

**OLD FORT #65**
Where: To Be Determined
Fort Wayne
Date: Last Thursday; Time: Varies
Meeting Contact: Phillip Salisbury, CPE
psalisbury@blundall.com

**INDIANA**
Central Indiana #59
Where: To Be Determined
Indianapolis
Date: 3rd Thursday; Time: Varies
Meeting Contact: Noelle Cichy
ncichy@summitconStreetcom

**GEORGIA**
Atlanta #14
Where: Sage Woodfire Tavern
4505 Ashford Dunwoody Road
Atlanta - 30346
Date: 2nd Monday; Time: 11:30 AM
Meeting Contact: Clinton Aldridge
clinton.aldrige@skansa.com

**MARYLAND**
Baltimore #21
Where: To Be Determined
Baltimore
Date: Varies; Time: Varies
Meeting Contact: Ed Cluster, CPE
eccluster@phoenix-eng.com

**MASSACHUSETTS**
Boston #25
Where: Maggiano’s Little Italy
4 Columbus Avenue
Boston - 02116
Date: 3rd Wed.; Time: Varies
Meeting Contact: Mario DiCesare
Mario.DiCesare@aecom.com

**MICHIGAN**
Detroit #17
Where: Visit www.aspe17.org
To Be Determined
Detroit
Date: Varies; Time: Varies
Meeting Contact: Mel Oakley, LCPE
oakley.me@gmail.com

**ILLINOIS**
Chicago #7
Where: Barbakoa Tacos & Tequila
1341 Butterfield Rd
Downers Grove - 60515
Date: 3rd Thursday; Time: 6:00 PM
Meeting Contact: Bob Svoboda, CPE
bsvoboda@ccsdifference.com

**IOWA**
Quad Cities #71
Where: To Be Determined
Davenport
Date: Varies; Time: Varies
Meeting Contact: Keith Parker, CPE
keithparker@circlebco.com

**OLD FORT #65**
Where: To Be Determined
Fort Wayne
Date: Last Thursday; Time: Varies
Meeting Contact: Phillip Salisbury, CPE
psalisbury@blundall.com

**NEW ORLEANS #9**
Where: To Be Determined
New Orleans
Date: TBD; Time: TBD
Meeting Contact: Chuck Hesselbein, CPE
chesselbein@baldwinshell.com

**ORLANDO #50**
Where: To Be Determined
Orlando
Date: TBD; Time: TBD
Meeting Contact: Danny Chadwick, CPE
dchadwick@bellsouth.net
ASPE CHAPTER MEETINGS (CONTINUED)

► MINNESOTA

Viking #39
Where: Varies
To Be Determined
St. Paul
Date: Varies; Time: Varies
Meeting Contact:
Keith Parker, CPE
keithparker@circlebco.com

► MISSOURI

St. Louis Metro #19
Where: Varies
To Be Determined
Columbus
Date: Varies; Time: Varies
Meeting Contact:
Keith Parker, CPE
keithparker@circlebco.com

► NEVADA (CONTINUED)

Las Vegas #72
Where: Varies
To Be Determined
Reno
Date: Varies; Time: Varies
Meeting Contact:
Larry Hendrick, CPE
lhendrik6899@aol.com

► NEW JERSEY

Garden State #26
Where: Varies
To Be Determined
Kenilworth
Date: 4th Tuesday; Time: Varies
Meeting Contact:
Jeffery Senholzi
costnav@ptd.net

► NEW MEXICO

Roadrunner #47
Where: Fiestas Restaurant
4400 Carlise Boulevard NE
Albuquerque - 87107
Date: 1st Wed.; Time: 11:30 AM
Meeting Contact:
Joshua Crooker-Flint, CPE
joshc@auiinc.net

► NEW YORK (CONTINUED)

Western NY #77
Where: To Be Determined
Rochester
Date: TBD; Time: TBD
Meeting Contact:
Gregory Williamson, CPE
gwilliamson@bondbrothers.com

► OHIO

Buckeye #27
Where: Varies
To Be Determined
Columbus
Date: Varies; Time: Varies
Meeting Contact:
Keith Parker, CPE
keithparker@circlebco.com

► OREGON

Columbia-Pacific #54
Where: University Place
310 W. Lincoln Street
Portland - 97201
Date: 3rd Tuesday; Time: 5:30 PM
Meeting Contact:
Craig Welburn
cwellburn@cherrycityelectric.com

► OKLAHOMA

Landrun-OK City #80
Where: Ingrid's Kitchen
3701 North Young Boulevard
Oklahoma City - 73112
Date: 1st Wed.; Time: 11:30 AM
Meeting Contact:
Ed Harris
ed.harris@dormakaba.com

► NEW YORK

New York #10
Where: To Be Determined
To Be Determined
New York City
Date: Varies; Time: Varies
Meeting Contact:
Bruce Schlesier, CPE
bruce_schlesier@msn.com

► NEVADA

Reno #12
Where: To Be Determined
To Be Determined
Reno
Date: Varies; Time: Varies
Meeting Contact:
Kris Larson
klarson@cccutah.com

► NEBRASKA

Great Plains #35
Where: To Be Determined
To Be Determined
Omaha
Date: Varies; Time: Varies
Meeting Contact:
Keith Parker, CPE
keithparker@circlebco.com

► NEW YORK

Landrun-OK City #80
Where: Ingrid's Kitchen
3701 North Young Boulevard
Oklahoma City - 73112
Date: 1st Wed.; Time: 11:30 AM
Meeting Contact:
Ed Harris
ed.harris@dormakaba.com

► OREGON

Columbia-Pacific #54
Where: University Place
310 W. Lincoln Street
Portland - 97201
Date: 3rd Tuesday; Time: 5:30 PM
Meeting Contact:
Craig Welburn
cwellburn@cherrycityelectric.com

Heartland #32
Where: Uncle Buck's Grill or Bass Pro Shops
See Meeting Contact
Date: 3rd Wed.; Time: TBD
Meeting Contact:
Eric Soriano
esoriano@hermeslandscaping.com

► NEW MEXICO

Roadrunner #47
Where: Fiestas Restaurant
4400 Carlise Boulevard NE
Albuquerque - 87107
Date: 1st Wed.; Time: 5:30 PM
Meeting Contact:
Joshua Crooker-Flint, CPE
joshc@auiinc.net

► NEW YORK

Landrun-OK City #80
Where: Ingrid's Kitchen
3701 North Young Boulevard
Oklahoma City - 73112
Date: 1st Wed.; Time: 11:30 AM
Meeting Contact:
Ed Harris
ed.harris@dormakaba.com

► OREGON

Columbia-Pacific #54
Where: University Place
310 W. Lincoln Street
Portland - 97201
Date: 3rd Tuesday; Time: 5:30 PM
Meeting Contact:
Craig Welburn
cwellburn@cherrycityelectric.com
ASPE CHAPTER MEETINGS (CONTINUED)

- **PENNSYLVANIA**
  - **Greater Lehigh Valley #41**
    - **Where:** To Be Determined
    - **Allentown**
    - **Date:** TBD; **Time:** TBD
    - **Meeting Contact:**
      - Gregory Williamson, CPE
      - gwilliamson@bondbrothers.com

- **TEXAS**
  - **Houston #18**
    - **Where:** Spaghetti Westerns
      - 1608 North Shepherd
      - Houston - 77007
    - **Date:** 2nd Monday; **Time:** 6:00 pm
    - **Meeting Contact:**
      - Dennis Pyland
      - dennis.pyland@gmail.com

- **WASHINGTON**
  - **Puget Sound #45**
    - **Where:** Best Western Executive Inn
      - 200 Taylor Avenue North
      - Seattle - 98109
    - **Date:** 3rd Tuesday; **Time:** TBD
    - **Meeting Contact:**
      - Mike Booth
      - mike.booth@msn.com

- **WISCONSIN**
  - **Brew City #78**
    - **Where:** To Be Determined
      - Milwaukee
    - **Date:** Varies; **Time:** Varies
    - **Meeting Contact:**
      - Keith Parker, CPE
      - keithparker@circlebco.com

- **UTAH**
  - **Salt Lake City #51**
    - **Where:** Varies
      - Salt Lake City
    - **Date:** 3rd Thursday; **Time:** Varies
    - **Meeting Contact:**
      - Phil Capell, CPE
      - president@aspesaltlake.org

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

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Please Note: Information is subject to change. Report changes in your Chapter’s information with an email to jennifer@ASPEnational.org.