



ASPE

AMERICAN SOCIETY OF
PROFESSIONAL ESTIMATORS

ORANGE COUNTY CHAPTER 3

MAY 2012

Issue 51
Volume 2012



WWW.ASPENATIONAL.COM
WWW.ASPECHAPTER3.ORG

OUR MISSION

Since 1956, ASPE serves the construction & engineering industries by providing education, training, fellowship and opportunities for professional estimating development.



ORANGE SPEEL NEWSLETTER



MAY 2012

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PRESIDENT'S CORNER

MAY 2012

President's Message



Hello Everyone,

The April educational meeting speaker was Mr. Paul Johnson who spoke to us about "The Ranch Plan" of the Mission Viejo Company. Check out the Meeting recap article for details of the meeting in this Newsletter. We have been searching for programs that are timely and relative to our members and guests. Thanks to everyone's support, the energy at the Dinner Meetings have shifted to being more exciting with more networking going on over the last few months. That is attracting new interest in professionals in our area. Keep coming back it is fun and working.

As mentioned at the April meeting the Membership Drive ends May 31, 2012 where a first time member joins at the full rate of \$300.00 during April 1 and May 31 this year they will receive a voucher for a second membership at a reduced cost of \$110.00 instead of the full \$300.00 rate. All memberships are for 12 months and will begin August 1, 2012. All renewals will be at the full membership rate. In addition, all Certified Professional Estimator applications for the summer certification cycle are to be submitted by July 1, 2012.

Our Chapter fiscal year ends July so we are already rapidly approaching our year end. My hope is to hear from the IRS with respect to our not for profit status very soon and moving finally procuring a Business Merchant

President's Message

credit card account so we can make credit and debit card transactions at all of our events, better control Chapter expenses, make event transactions more convenient for our members, guests and vendors and to conduct Chapter Business in general. We will be filing our first IRS Form 990-N to report Chapter gross receipts and expenses to the IRS to maintain our not for profit status. Achieving and maintaining the not for profit status is key to achieving our goal this year of making the Chapter a viable legal entity. In addition we are working hard in having smooth running operations, clear position responsibilities, objectives and systems. Our goals are to educate all those interested, local college students and the general public about estimating; support members in becoming a CPE and maintaining their certification; keep members current with new estimating technologies and methods, and increase the number and amounts of scholarships we award by being efficient in producing programs and in how we operate. We have some great events on the horizon you will not want to miss out on. Participating on event committees is really not a very large time commitment and is very rewarding. Contributing a little time and effort adds significantly to the success of the Chapter's success in achieving it goals.

Every ASPE Chapter member is encouraged to attend at least one Board Meeting and serve as an officer, director or on a committee. Please contact me to talk about these positions and if you have any suggestions, questions or to visit one of our Board Meetings. You may also communicate to the Board members through the Chapter Face book page if you choose.



Gregory R. Clayton

MEETING INFORMATION

Dinner meeting

TOPIC

“Win More Bids, Reduce Risk, Focus on Your Core Business”

PRESENTED BY *Kathleen Schneider*

Organizations are at heightened demand to be responsive and scalable in a rapidly changing construction environment. Understand how to increase efficiency, control cost overruns, reduce risk and realize additional profitability on existing jobs and new business.



Date

Wednesday, May 9, 2012

Time

5:30 p.m. Social Hour & Networking

6:30 p.m. Program & Dinner

Location

Ayres Hotel 325 Bristol St. Costa Mesa, CA 92626

Cost \$40

(Includes Appetizer, Choice of Filet of Salmon, Chicken Cordon Bleu, Beef Stoganoff, Coconut Cake, coffee/tea)

RSVP at www.aspechapter3.org

Presentation Outline

- What's in “The Cloud” I'm an Estimator, so Why do I Care?
- We Have That Documented...Now If I Can Just Remember Where I Put It.
- If I Only Had More Time and Access To Information When I Need It!
- Win More Bids.... Find Additional \$\$ In Labor Costing on Prevailing Wage Projects
- Death by 1000 Spreadsheets

MEETING INFORMATION

Dinner meeting



Kathleen Schneider

Kathleen Schneider
President of Richman Knoll Associates

In her 20 years as company officer for a third party administrator our presenter understands the challenges faced by business owners to increase efficiency, profitability and streamline operations in the complex contracting environment. Specializing in assisting contractors with fixed cost and risk reduction strategies through adoption of technology, paperless environments, labor cost restructuring (Prevailing Wage) and contracting non-essential services to free up brainpower and focus on your business.

Prior her position with the TPA, Kathy was a Director of Human Resources for a subsidiary of the Chemed organization based in South Los Angeles. She oversaw negotiations for five CBAs (Los Angeles, San Francisco, Sacramento, Las Vegas and Seattle), Risk Management, Governmental Affairs, Benefits & Payroll, and Employee Relations.

She holds a B.A. in Psychology, a Masters in Business Administration and holds a Lifetime Senior Professional in Human Resources (SPHR) certification, and insurance licenses in 40 states.

ARTICLES

By Steve Murow

Ethics Article

Congratulations



Best President Award

Congratulations to **Mike Mills** achieving "Best President Award"

Calendar of Events

- **May 9, 2012**
– Dinner meeting
"Win More Bids, Reduce Risk, Focus on Your Core Business"
PRESENTED BY *Kathleen Schneider*
- **Jun 13 2012**
– Dinner meeting
- **Jun 25 2012**
– Annual Golf Day
- **More information**
Visit chapter website for calendar

"...the Truth and nothing but the Truth?"

Before you swear under oath to tell the truth and nothing but the truth you better make sure your CV (Curriculum Vitae) or resume is accurate and true. If you are going to tell the Judge that your "gal" was supposed to pay your memberships in the fourteen (14) associations you listed on your CV as a member of you may as well take a gun to your head. Your career will be over – you may as well shoot yourself.

On a recent case I was called to testify in as an expert witness in cost estimating I was asked to critique the qualifications of the opposing expert. I was appalled that the fella had proudly listed his associations and memberships in organizations that he was not a member of and never was a member of. I was especially angered when I saw ASPE listed. To make matters worse, the "expert" had listed that he passed the ASPE EP2 Exam – as if it was part of the ASPE certification program. Here is the description from the National site:

By Steve Murow

Ethics Article

Estimating Proficiency 2 Exam (EP2) [Buy online now!](#)

Reinforce your skill level. Boost your resumé. Great for potential Senior Estimators.

The EP2 Exam gives the Employer a means to verify the potential employee's competency as an estimator.

The exam will exemplify the candidate's experience in the profession, and that he/she possesses the estimating knowledge and skills to go to the next level. It also serves the potential employee as a good first step to achieving CPE status/credentials.

I mentioned I was VP of ASPE and that the EP2 exam is a test given by employers to see if their applicants for work know anything about estimating. We all know something about estimating – it's a tough darn job (but somebody has to do it). It has taken me over 30 years to gain the confidence in my estimating skills to allow me to defend an estimate, a budget, a pro forma or a cost to repair matrix in court. It is the education, experience and years of practice that permits one to be called an "estimator." It takes a technical paper of 2,500 words, an exam, and much more criteria to be called a "certified professional estimator."

Here is an excerpt from the arbitration award letter:

20. In addition, this Neutral Arbitrator has never quite seen the total dissembling of a cost of
21. repair expert, namely Mr. XXXXX as that accomplished at trial by Claimant's expert, Mr.

By Steve Murow

Ethics Article

22. Steven Murow of The Moote Group. It would be a complete waste of time to give Mr. XXXXX any
23. credibility whatsoever in the light of Mr. Murow's overwhelming superior training, education and
24. experience in this highly competitive field of forensic expert work. Suffice to say, the opinions of
25. Mr. Murow were accepted and those of Mr. XXXXX were not. Mr. XXXXX is self-limited by reason
26. of his exclusive devotion to the world of litigation as a forensic witness as opposed to the feet-in-
27. the-dirt work of true contractors, estimators and take-off experts. Conclusion. The Neutral
28. Arbitrator finds Claimant's cost of repair as amended is reasonable, and Claimant is entitled to

Bottom Line: Tell the truth!

Secondly, take part in the ASPE educational dinners, seminars and academy's and get certified. Enjoy the benefits of membership in ASPE.

Steve Murow

Steve Murow currently serves as a consultant to the construction industry and provides litigation support and expert witness services on grading, underground, street improvements and site development matters at The Moote Group. His workload is roughly 25% expert witness, 25% construction oversight, 25% consultant to contractors and 25% consulting on land development pro formas and budgets. Murow is currently the VP of ASPE Chapter 3 and President of the Forensic Expert Witness Association in Orange County and a National Executive Board Member.

ARTICLES

By Scott Porterfield

Technical Article

2011 - 2012

Board of Directors

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3rd Vice President

TBD

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Ron Svarc
Wil Beukman
Paulette Rutlen
Dan Schottlander

Estimating vs. The Short Cut

I work for The Moote Group a full service land management team. We offer a wide range of services however; I wanted to write about how we approach a project cost to complete proforma versus how not to.

The quick and easy way to produce a cost to complete proforma is to take the project improvement quantities off the construction plans title sheet and obtain unit pricing from a somewhat recent bid result spread sheet found through a public agency website. An additional step would be to take several of the same items of work from a source of bid results (a public agency) and average them giving you a false sense of confidence. The problem with this is you have no idea what's below the surface, no idea of working conditions and limitations. This is the wrong way to create a cost to complete proforma.

The Moote way to create a cost to complete proforma is to ignore the engineers quantities (no offense) and perform our own take offs. When estimating unit pricing for each improvement item we look at the characteristics of the job. Lets look at a specific scope of work like sewer improvements.

Some non-ASPE member could look at a set of sewer plans for a typical housing tract and assume a general sewer depth at eight feet, consider no conflicts, wide open space, manholes 300' on center, "blow and go" using the best case scenario unit pricing to determine their cost.

By Scott Porterfield

Technical Article

Committee & Chairs

Chapter Awards

Greg Clayton, Mike Mills, Ron Svarc

Scholarship

Marketing

Steve Murow, Tom Smithson, Greg Clayton

Programs

Tom Smithson, Greg Clayton, Steve Murow

Fundraising

Steve Murow, Greg Clayton, Tom Smithson

Membership

Ron Svarc, Mike Mills, Greg Clayton

Certification

Ron Svarc

Education

Wil Beukman

Standards

Mike Mills

By-Laws

Mike Mills

Corporation

To understand the true personality of any given scope of work we need to visit the proposed construction site and do a field inspection, surveying the entire site specifically the perimeter. It's important to determine if any conflicts exist not shown on the plans, and to note any limitations such as access, overhead wires, neighbors etc. We always look to see how the site will handle a rain event and plan accordingly. Possibly the most important document to obtain and understand is the soils report.

The risks are great if we do not do our due diligence. Some examples one could find problematic by using unit pricing from another unknown project; The sewer line depth, a more traditional housing tract might have an average 8' depth but in many cases due to tie-in elevation and/or terrain the depth could easily be double. By not understanding the soils report the cost to include the possibility of the need for shoring, dewatering, handling hazardous types of soils and or water. Benefits of a field inspection are seeing things not shown on the plans and including costs for removal and replacement if necessary. Project specific conditions are unique and can prove to be costly like limited working hours, portions of the work to be done at night only, pipe encasement where specified, traffic control phasing and limited working days allowed.

These are just a few reasons not to trust generic unit pricing for a quick estimate.

Scott Porterfield

RE-CAPS! RE-CAPS

By Erica Passavanti

Dinner Meeting

April 11, 2012

Dinner MEETING OVERVIEW



Last month's Educational Dinner Meeting featured Paul Johnson. Paul is the Senior Vice President of Community Development for Rancho Mission Viejo which oversees design and implementation of master plan communities. His management responsibilities are currently focused on the development of the Ranch Plan located in South Orange County. His responsibilities are

to oversee and lead the project's urban design, development, marketing, builder land sales and administration and the master maintenance corporation. Specific to these areas of responsibility are the project's scheduling, budgets, land design, working drawings, builder coordination, land sales, and operation of the master maintenance/community service corporation.

Paul began his presentation answering the question: What is the long term development plan for Rancho Mission Viejo? Rancho Mission Viejo is comprised of more than 17,000 acres of permanent open space to be preserved as The Reserve at Rancho Mission Viejo as well as 6,000 acres to be developed into multiple villages of residential and mixed-use development. Over the next 20 years, Rancho Mission Viejo is expected to offer 14,000 homes, including 6,000 active adult residences and five million square feet of non-residential uses.



The next question Paul answered was: What is the timeframe for the opening of the Village of Sendero? The first village on the Ranch will be Sendero, now under construction and currently scheduled to open in summer 2013.

By Erica Passavanti

Dinner Meeting

Paul then introduced us to the new community of Sendero and Gavilan. Sendero is around 690 acres and will offer approximately 940 attached and detached homes and 200 apartment units. Sendero will include the gated active adult enclave of Gavilan.



He then discussed the new ideas for the 1st Village of Sendero and Gavilan. Among the amenities planned for all Sendero residents are a centrally located community hall, clubhouse and recreational core, a 15-acre community park, neighborhood parks, hiking/biking trails accessing Reserve trails and a County Regional hiking and biking trails network, a 10-acre retail plaza, fire station, and a child day care center.



He finished with the unique concept for the enclave of Gavilan. Gavilan will provide 285 single-level residences adjacent to a private clubhouse and recreational facilities. Gavilan residents will be encouraged to connect with the market rate residents in many ways and celebrate health and wellness through private and shared-use clubhouses, a social hall and plaza, a village green, swimming pools, fitness centers and an abundance of gathering places.

Paul's presentation was very informative and outlined what the future holds for one of the largest last remaining land holdings in Orange County. It was great to see so many members and guests in attendance.

Erica Passavanti

RE-CAPS! RE-CAPS

by Gregory R. Clayton

BOD Meeting

Committee & Chairs

Website

Paulette Rutlen

Newsletter

ChiaYen Yuan, Dan Schottlander

Historical

Finance

ChiaYen Yuan, Steve Murow, Wil Beukman

Budget

Steve Murow, Wil Beukman, Mike Mills

Board Members

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Ron Svarc, LCPE
Accurate Consultant Services, 949.683.4751
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April 4, 2012 BOARD OF DIRECTORS MEETING OVERVIEW

The meeting began like normal Board meetings do with going through the agenda items of approving the previous Board Meeting Minutes, 501C6 Corporation nonprofit status report, Programs report, the Treasurer report, President report and Committee Chairs reports followed by new business where we made plans for the 2011-2012 year and beyond.

The big news is we have not heard from the IRS by the time the IRS notified us that we would hear from them on our not for profit status. We expect to hear any time now. You may recall the merchant credit and debit card service for the Chapter through our F&M Bank is predicated on the IRS approval of our not for profit status.

ASPE National is making a one time \$30.00 fee assessment on all membership renewals this year to avoid exposure of having a deficit even after all the reduction in expenses the Board has made over the years. ASPE National has established a 2-4-1 Membership Drive. For every first time new member joining ASPE between April 1, 2012 and May 31, 2012, they will receive a membership voucher to give to a person interested in becoming a new first time member at a reduced first year cost of \$110.00 instead of the regular \$300.00 cost. You can find details of the Membership Drive on the National website at (www.aspenational.org/).

by Gregory R. Clayton

BOD Meeting

The Board discussed the ideas of Educational Dinner Meeting topics and speakers for the rest of the year, including the fall season. Steve Murow of the Programs Committee recommended the speaker on the development project at the Hollywood Park site be tabled until the project gets further along into its development. We talked about having a field trip at The Ranch Project if possible within a few weeks after the April presentation on The Ranch project by Paul Johnson. The Board recommended that Tom contact Kathleen Schneider to speak at the May meeting on “Cloud computing and paperless environment technologies that reduce fixed and direct costs and risks and other new estimating software on the market”. Greg will contact a speaker on new estimating technology about “GPS infrastructure project management technologies” for the June meeting.

The contract with the Aliso Viejo Country Club for the Golf Tournament has been negotiated and signed and the deposit paid to reserve our date of June 25, 2012 for our Annual Golf Tournament. This is a classic private golf course where we have held previous year’s tournaments. Steve has prepared a tournament plan, budget and formed the Golf Tournament Committee which will begin meeting in April to prepare for the event.

The Board has abandoned the inter Chapter 11th hour bid day simulation event as this year’s Academy event. The Board established a committee and Past President Mike Mills agreed to chair the committee. The committee is going forward with the event by soliciting 6 General Contractors to jointly sponsor and participate at various levels at the event. Chapter wide participation is imperative in bringing these events together and getting the word out of these events out to the public.

Lastly, all of the funds earned from the efforts of the Chapter are used to increase the 2011-2012 scholarship funds and to educate and serve its members.

Gregory R. Clayton, CPE
President/Secretary

GOLF INFORMATION

Steve Murow

Save the date

Thoughts or Suggestions?

We are looking for your ideas and input regarding our newsletter and dinner programs. Do you have an idea for an upcoming dinner meeting? Would you like to be a presenter at one of our dinner meetings? Is there a topic of discussion that we should write an article about? Would you like to be a contributor to our newsletter?

Please contact *ChiaYen Yuan* at ChiaYen.Yuan@fgould.com.

Membership

Applications for membership can be downloaded from the national website- www.aspenational.org, or on our local website- www.aspechapter3.org. For more information, contact *Greg Clayton* at gclayton@4cei.com.

ASPE ORANGE COUNTY#3 GOLF EVENT MONDAY, JUNE 25, 2012



Aliso Viejo Country Club at 33 Santa Barbara, Aliso Viejo off the 73 Tollway at Pacific Park/Glenwood, turn left to Golf Drive and turn left and follow into the course; 949-783-9686; www.alisogolf.com

11:00AM Registration

12:30PM Shotgun start in Scramble Format, Lunch served and Italian Buffet dinner to follow

Goodie Bag to all Players

Mulligan Package Available

Raffle Tickets for Fabulous Prizes

HOLE-IN-ONE on any of the four Par-3's pays \$5,000

Same player's fee as last year at \$145 per player

Sponsorship Opportunities available;

contact **Steve Murow** at [714-932-9992](tel:714-932-9992)

INFORMATION

Advertising Opportunities

For more
details

If you would like to advertise with us,
contact *ChiaYen Yuan* at
chiayen.yuan@fgould.com

	Per Issue	5 issues	10 issues (Best Value!)
Business Card	\$25.00	\$100.00	\$150.00
¼ Page Ad	\$50.00	\$200.00	\$350.00
½ Page Ad	\$100.00	\$400.00	\$750.00
Full Page Ad	\$200.00	\$750.00	\$1250.00

COMPANY MEMBER REPRESENTATIVES

*AECOM Analytical Planning Services, Inc. Bel Esprit Builders, Inc. Bert L. Howe and Associates
Brussel Consulting & Const Mgmt Casper Estimating Services Consolidated Contracting Services
Contracting Engineers Inc. Contractors & Cost Consultants Corecon Technologies Inc. Construction Cost Controls
Dharma Construction Security Disneyland Resorts Faithful + Gould fs3 PM/ CM gafcon GKK Work
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The Moote Group The Rosenthal Company Timko Inc. Woods Construction*

FOLLOW US

Facebook Account

BECOME OUR FACEBOOK FRIEND

& LOOK US UP:

“ASPE CHAPTER 3, ORANGE COUNTY”

Our chapter Facebook account is up & running—ASPE Chapter 3, Orange County—we have added a few friends from last month and we need more! If you have an account, look us up, so you can follow our status for upcoming events!



ASPE

CODE OF ETHICS

Canon #1

Professional Estimators shall perform services in areas of their discipline and competence.

Canon #2

Professional Estimators shall continue to expand their professional capabilities through continuing education programs to better enable them to better serve their clients, employers and the industry.

Canon #3

Professional Estimators shall conduct themselves in a manner, which will promote cooperation and good relations among members of our profession and those directly related to our profession.

Canon #4

Professional Estimators shall safeguard and keep in confidence all knowledge of the business affairs and technical procedures of an employer of client.

Canon #5

Professional Estimators shall conduct themselves with integrity at all times and not knowingly or willingly enter into agreements that violate the laws of the United States of America or of the states in which they practice.

Canon #6

Professional Estimators shall utilize their education, years of experience and acquired skills in the preparation of each estimate or assignment with full commitment to make each estimate or assignment as detailed and accurate as their talents and abilities allow.

Canon #7

Professional Estimators shall not engage in the practices of “bid peddling” as defined by this code. This is a breach of moral and ethical standards, and a member of this society shall not enter into this practice.

Canon #8

Professional Estimators and those in training to be estimators shall not enter into any agreement that may be considered acts of collusion or conspiracy (bid rigging) with the implied or expressed purpose of defrauding clients. Acts of this type are in direct violation of the Code of Ethics of the American Society of Professional Estimator.

Canon #9

Professional Estimators and those in training to be estimators shall not participate in acts, such as the giving or receiving of gifts, that are intended to be or may be construed as being unlawful acts of bribery.

FOLLOW US

by Paulette Rutlen

Twitter Account

We Need Volunteers!!

We need your help! Anyone who is interested in serving on a committee for the OC chapter, please contact Greg Clayton at gclayton@4cei.com for more information. This is a great way to give back to ASPE both personally and professionally. We encourage you to attend a board meeting to see what it's all about. We meet every other month in a physical location and all ASPE members are welcome to attend.

Welcome

We look forward to seeing you at this month's dinner meeting.



Serving construction estimating professionals by promoting ethical behavior, professional development, continuing education, standardization, certification and fellowship.



Twitter: [ASPE3OrangeCty](#)



Do you Tweet? With the advent of all of the social networking going on I figured we should be keeping up with the technology. For those of you not in the know, Twitter is a website that allows postings, called tweets, of no more than 144 keystrokes (yes, spaces count). With Twitter you can find individuals such as ASPE's national Executive Director (ASPENatExecDir), other chapters (ASPE12Reno or ASPE51SLCUtah), construction related organizations such as NAWIC, MC2, or McGraw Hill.

Intend on finding links to individuals and organizations that may be of interest to our membership. If you find an organization that you think would be of interest to our chapter membership let me know. Just post a tweet to ASPE3OrangeCty and I'll be sure to link us to the account.

Do you have insights to pass on to our membership regarding the construction industry in Orange County? With a Twitter account you can pass them along quickly. After all, how long can it take to type 144 characters? See a website or blog you think may be of interest, post the link with one tweet and the whole chapter can see it too.

Try it out. Even if you never post anything, you can follow the postings of whoever you may find interesting. Hopefully, one of those will be ASPE3OrangeCty.

Thank you for reading ASPE OC Chapter3.

ADVERTISING



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Interested in giving a presentation at our chapter dinner meetings?

Interested in getting your company name out to members?

Come educate and Share with our members!

Contact **Tom Smithson** at tedwardsmithson@gmail.com for more info!

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