



QUANTIFYING THE FUTURE



Where Have All the Estimators Gone?

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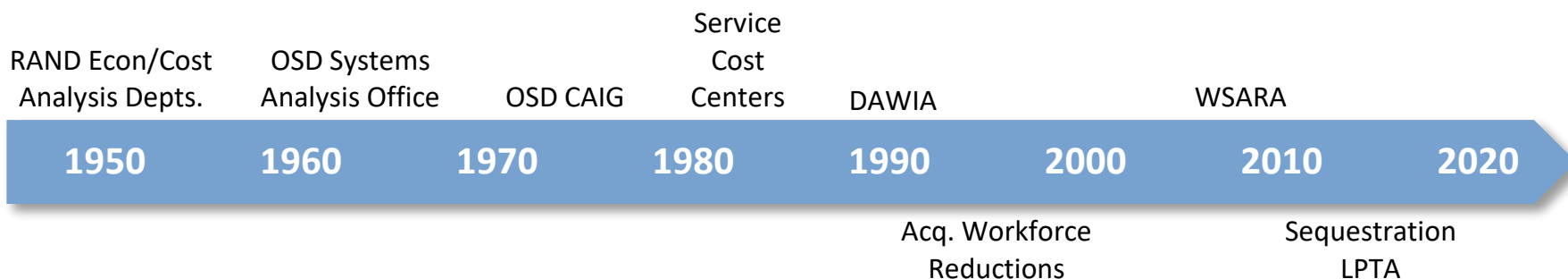
Introduction

- Programs face declining budgets, acquisition changes and expanding oversight resulting in increased demand for cost estimating & analysis
- Despite increased importance of cost estimating, ICEAA has seen a decline in membership
- Action plan for Government/Industry and ICEAA for overall growth in cost estimating

Brief History of Cost Estimating



- Ancient History
- Modern Day – Ups and Downs



History of Cost Estimating Organizations

- As of 2016, there were 217,900 cost estimators and 114,000 operations research analysts in the US
- By 2026, the number of cost estimators is expected to grow by 11% and the number of operations research analysts by 26%

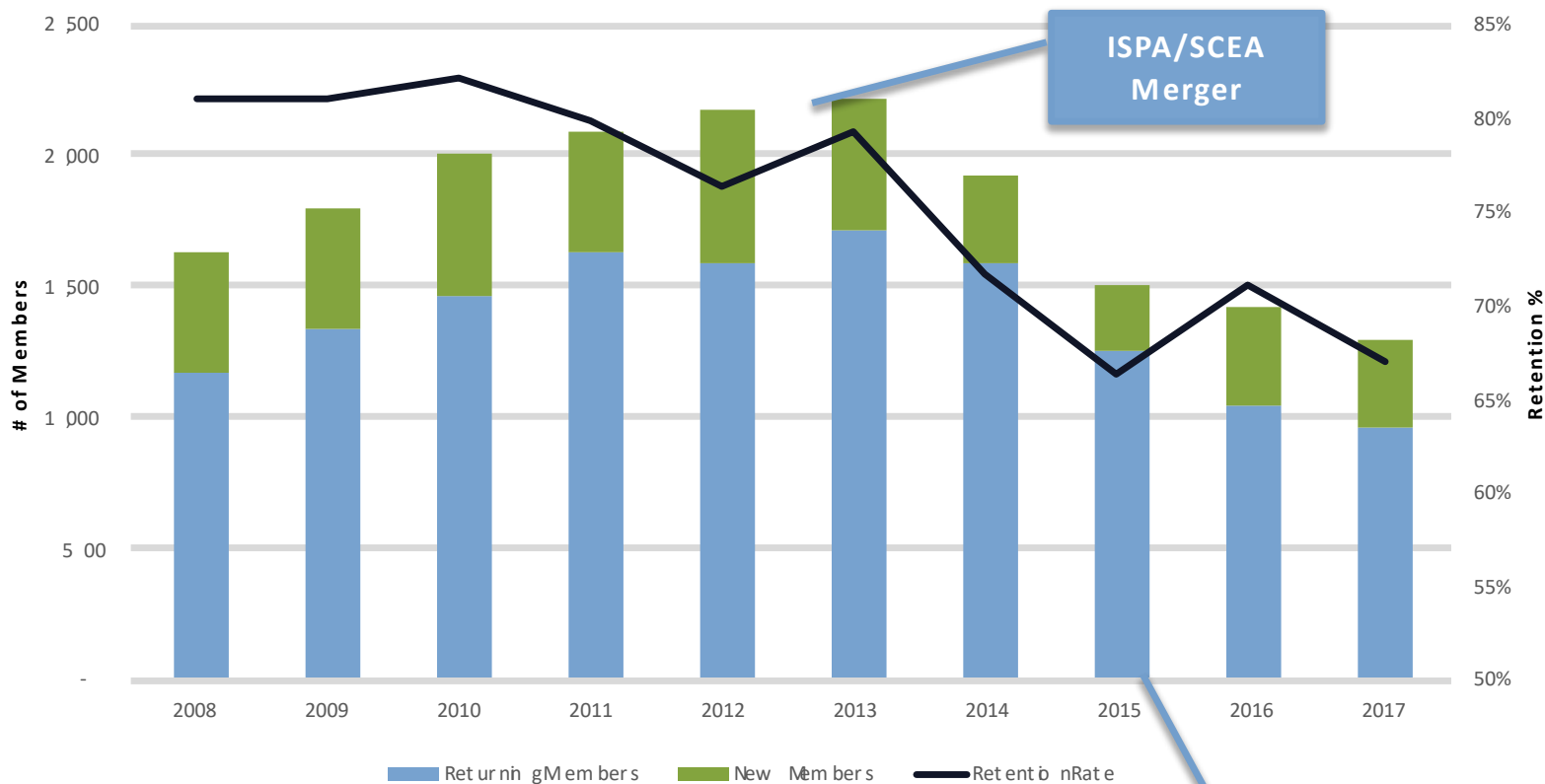
Major Professional Organizations

- American Society of Professional Estimators (ASPE)
- Professional Construction Estimators of America (PCEA)
- Association for the Advancement of Cost Engineering International (AACCI)

International Cost Estimating and Analysis Association (ICEAA)

- Created in 2012 when International Society of Parametric Analysts (ISPA) and Society of Cost Estimating and Analysis (SCEA) merged
- Traces back to 1979 with founding of ISPA
- SCEA formed in 1990 after merger of National Estimating Society and Institute of Cost Analysis
- Currently over 1,200 members with chapters across the world

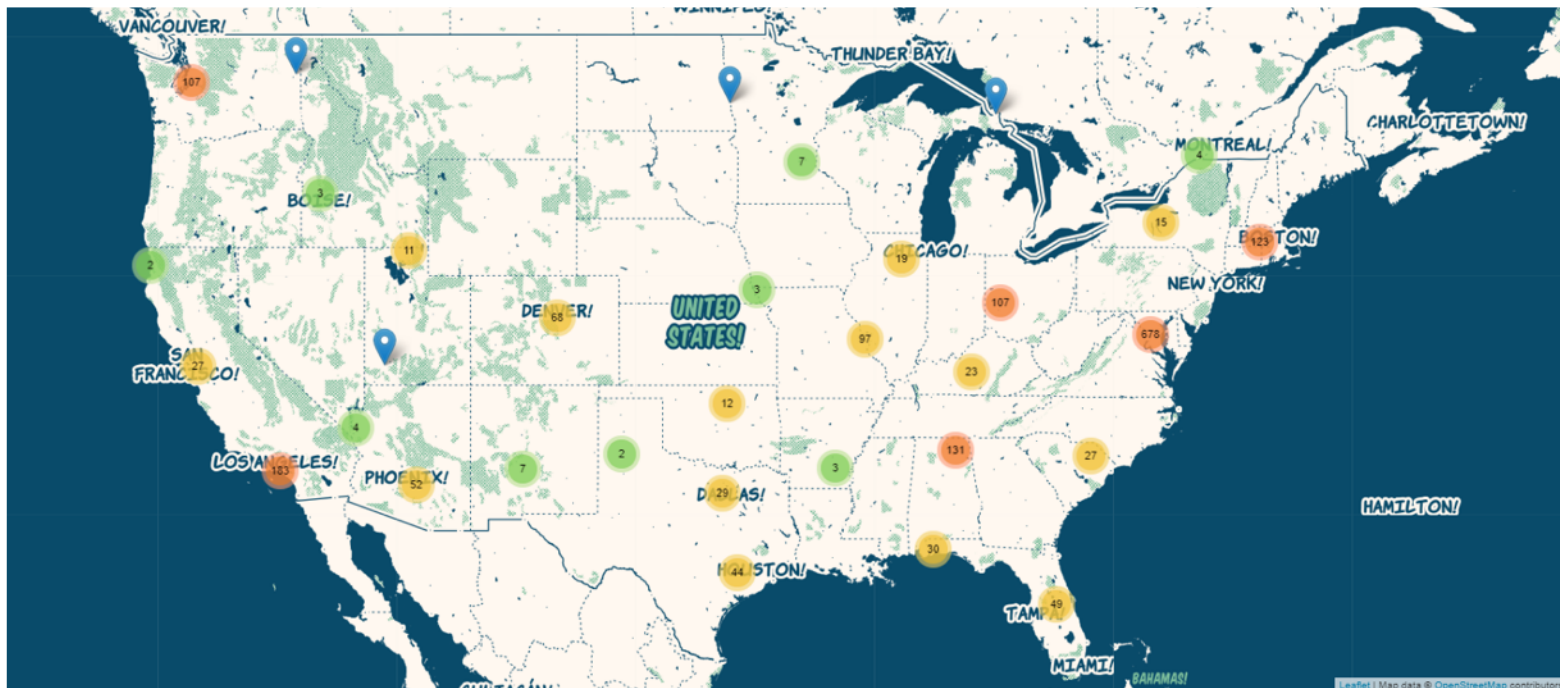
ICEAA Membership



- Data collection and analysis process
- Major ICEAA events
- Active Members
 - 29% Government/Education
 - 71% Industry

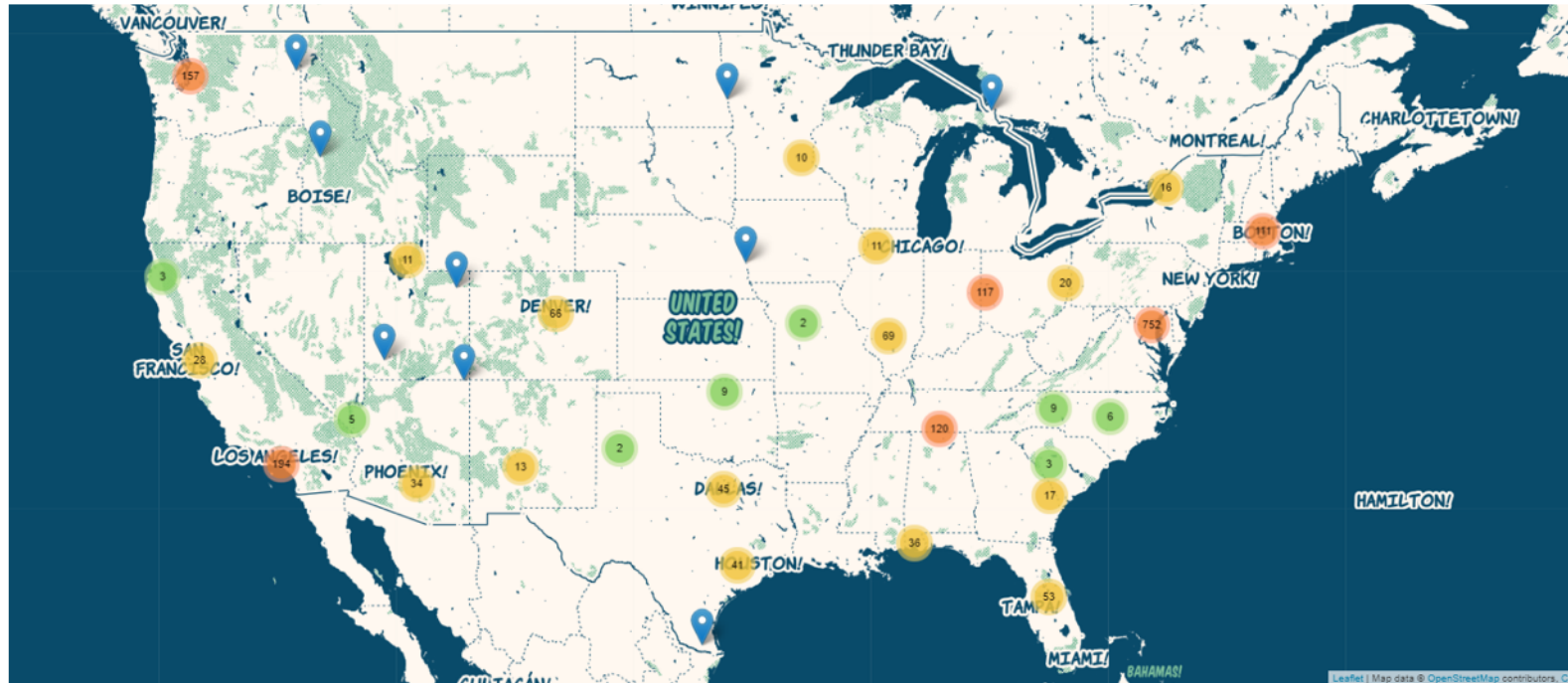
Membership Fee Increase

Geographic Look at ICEAA - US



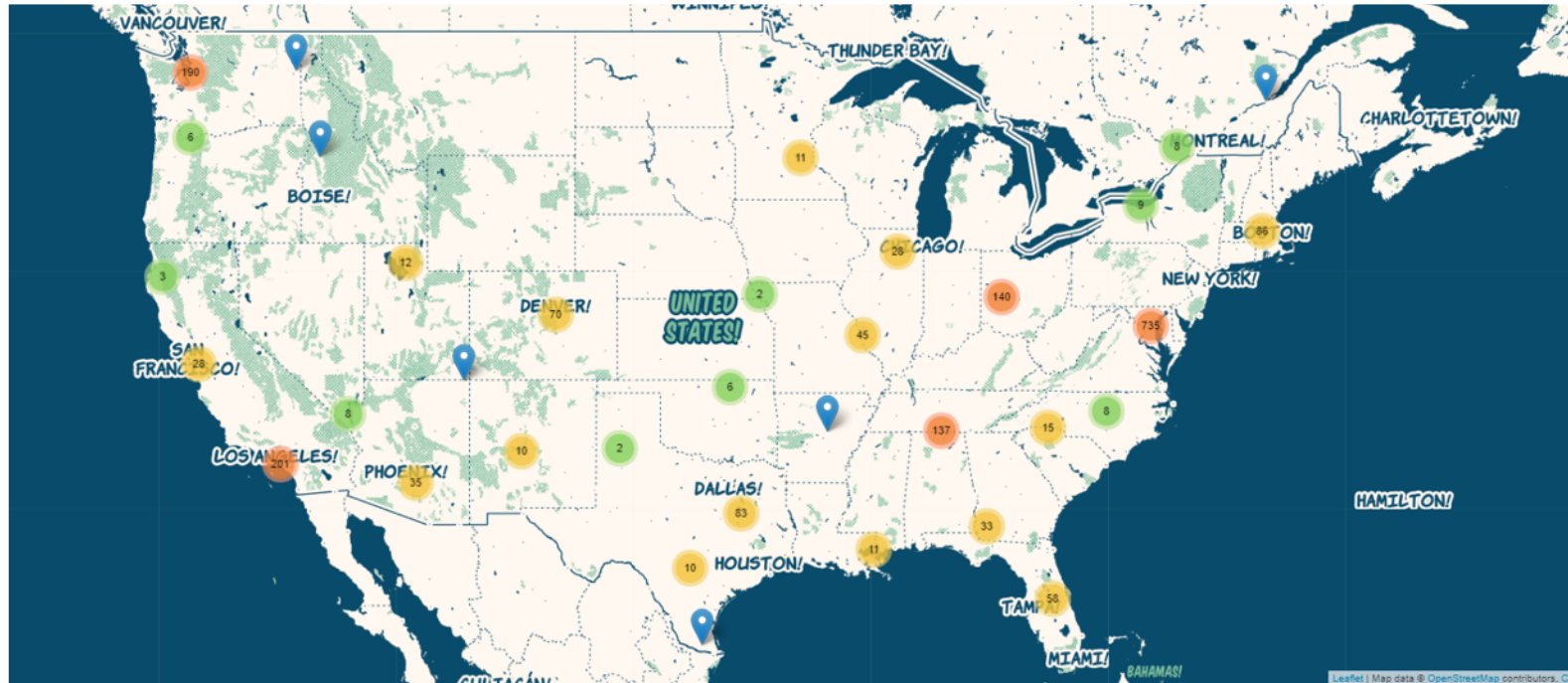
2009

Geographic Look at ICEAA - US



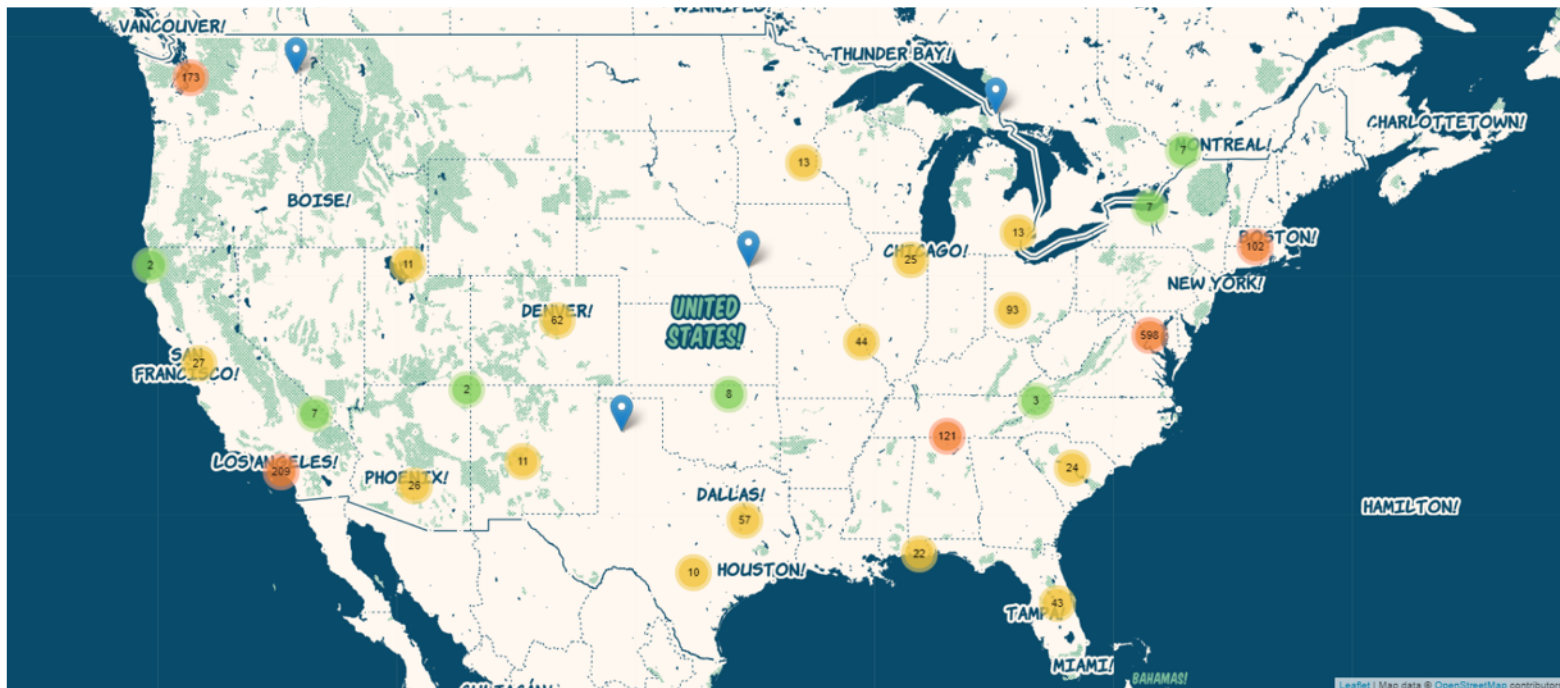
2011

Geographic Look at ICEAA - US



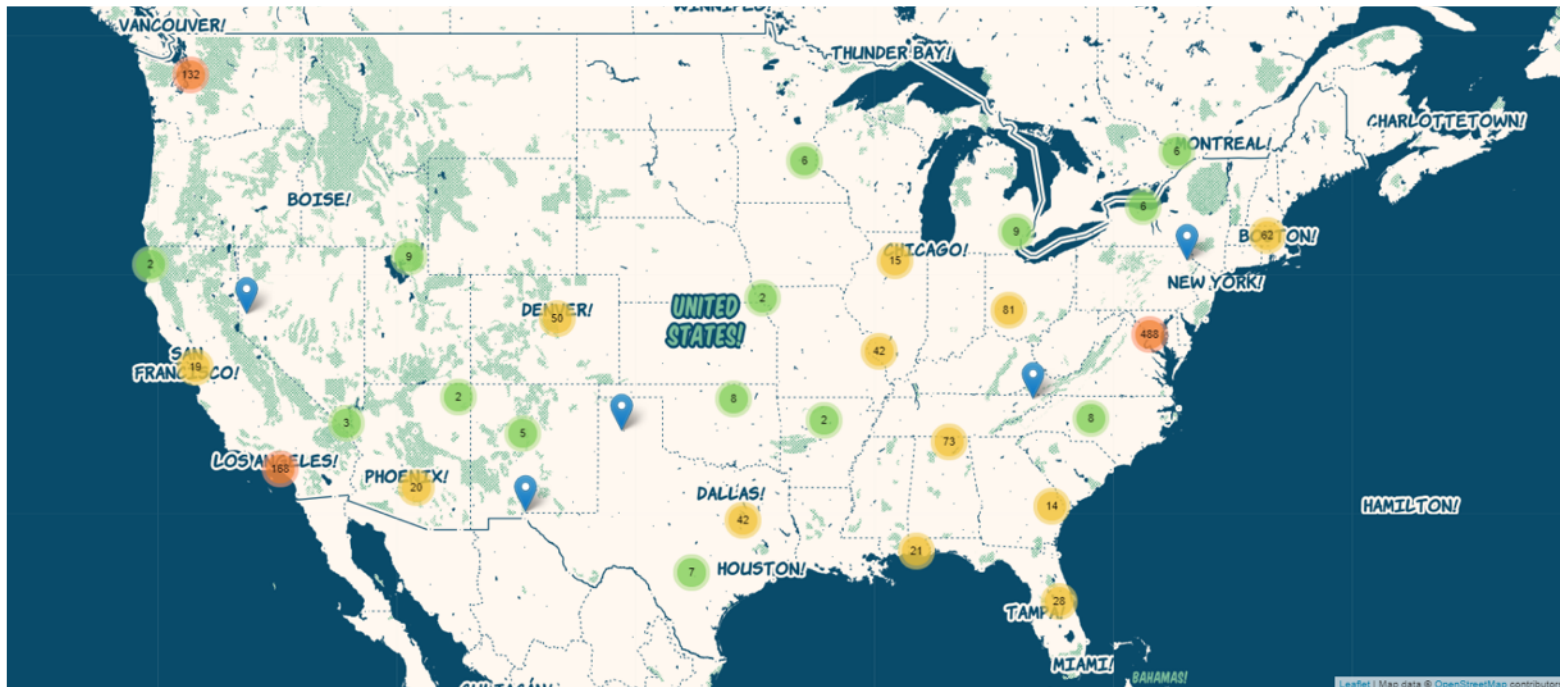
2012

Geographic Look at ICEAA - US



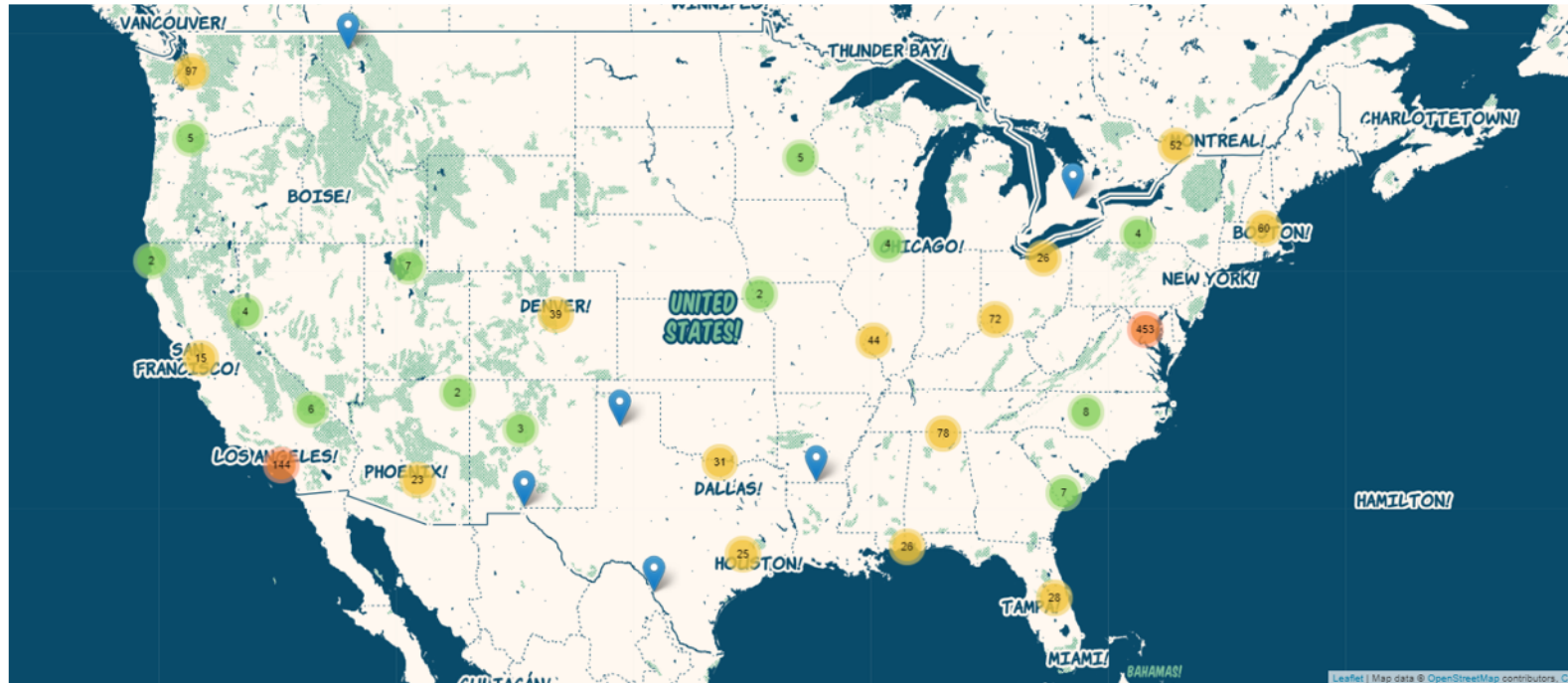
2013

Geographic Look at ICEAA - US



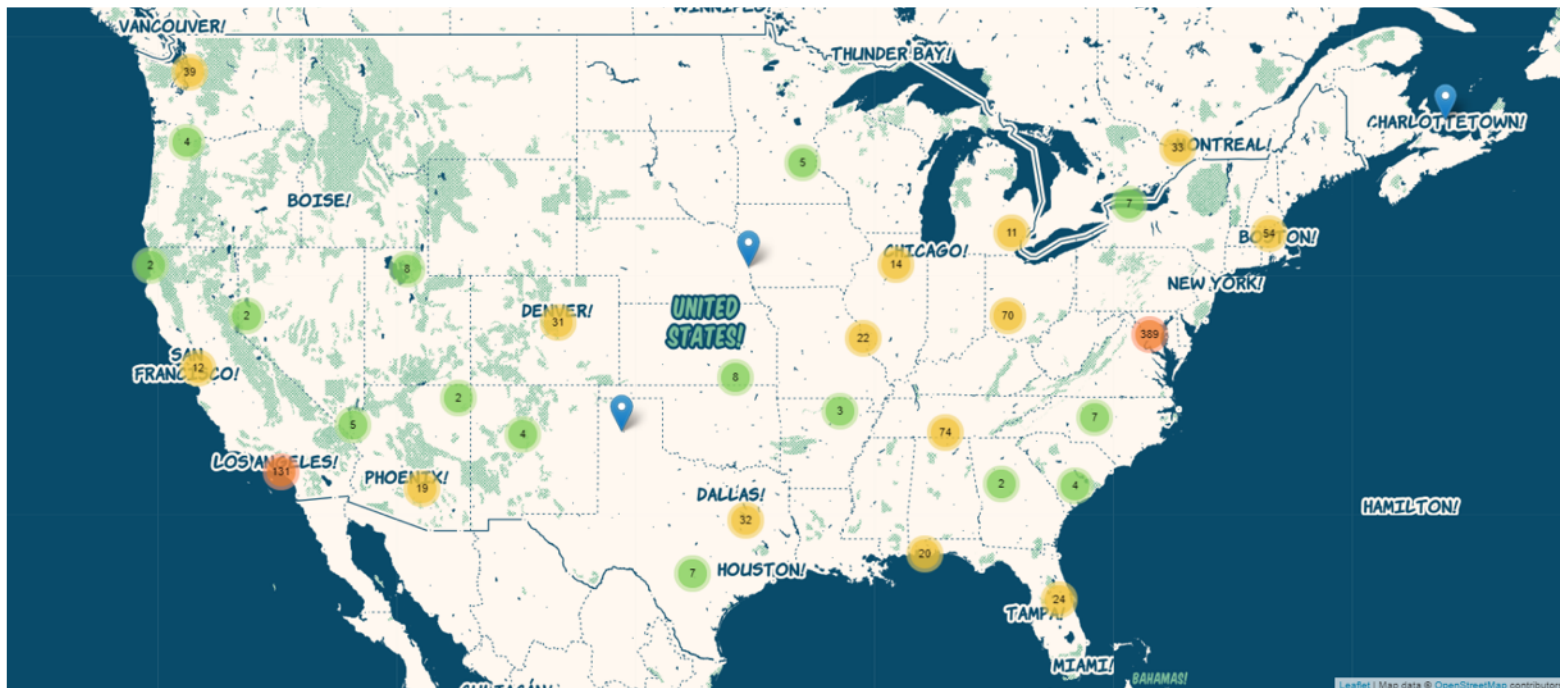
2014

Geographic Look at ICEAA - US



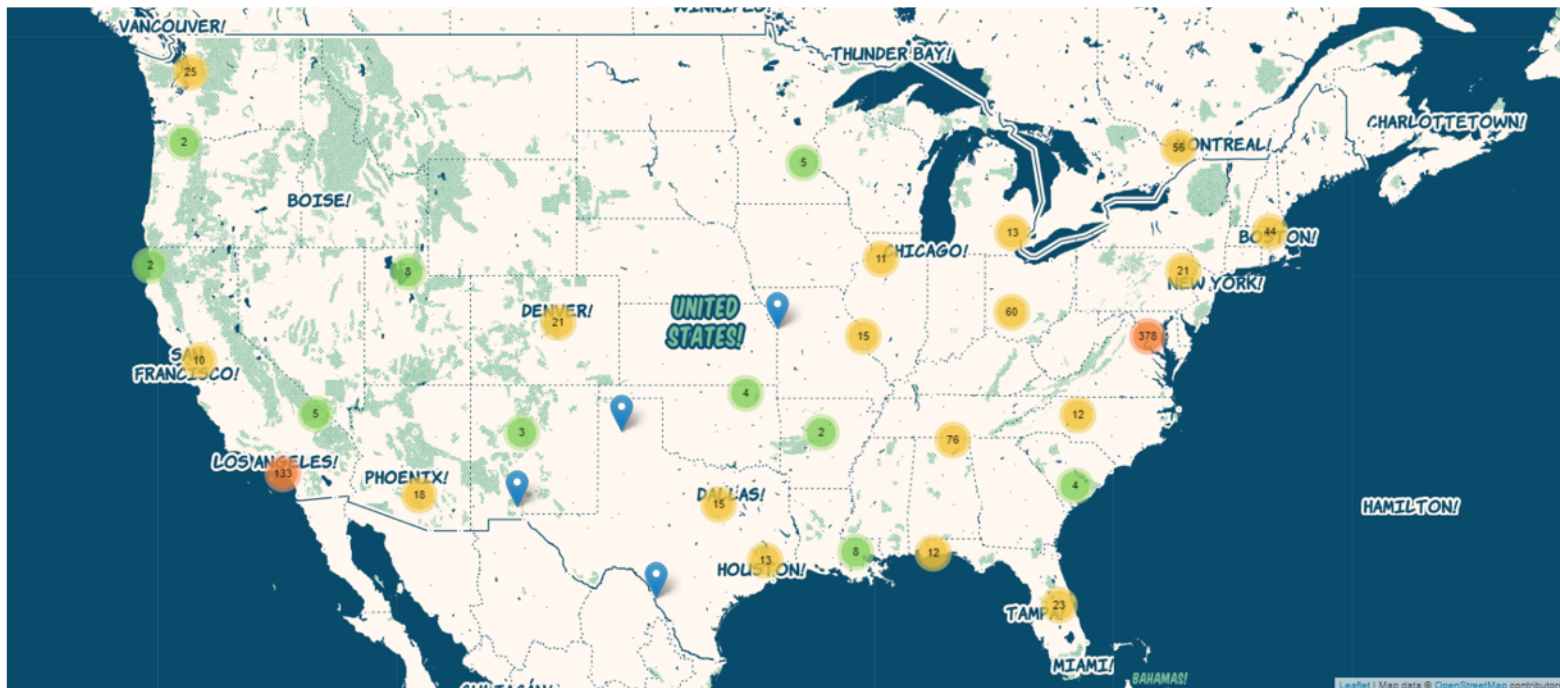
2015

Geographic Look at ICEAA - US



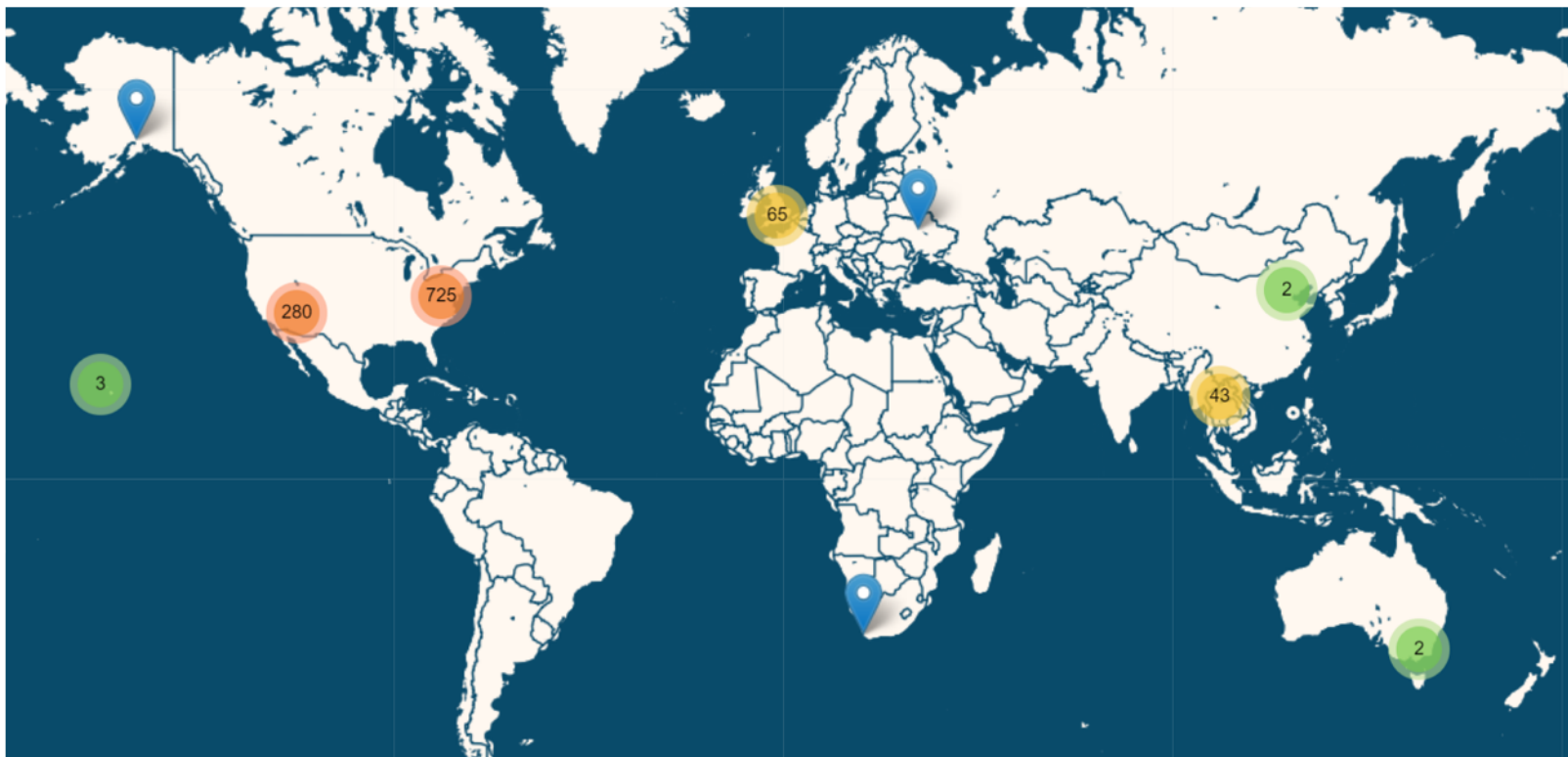
2016

Geographic Look at ICEAA - US



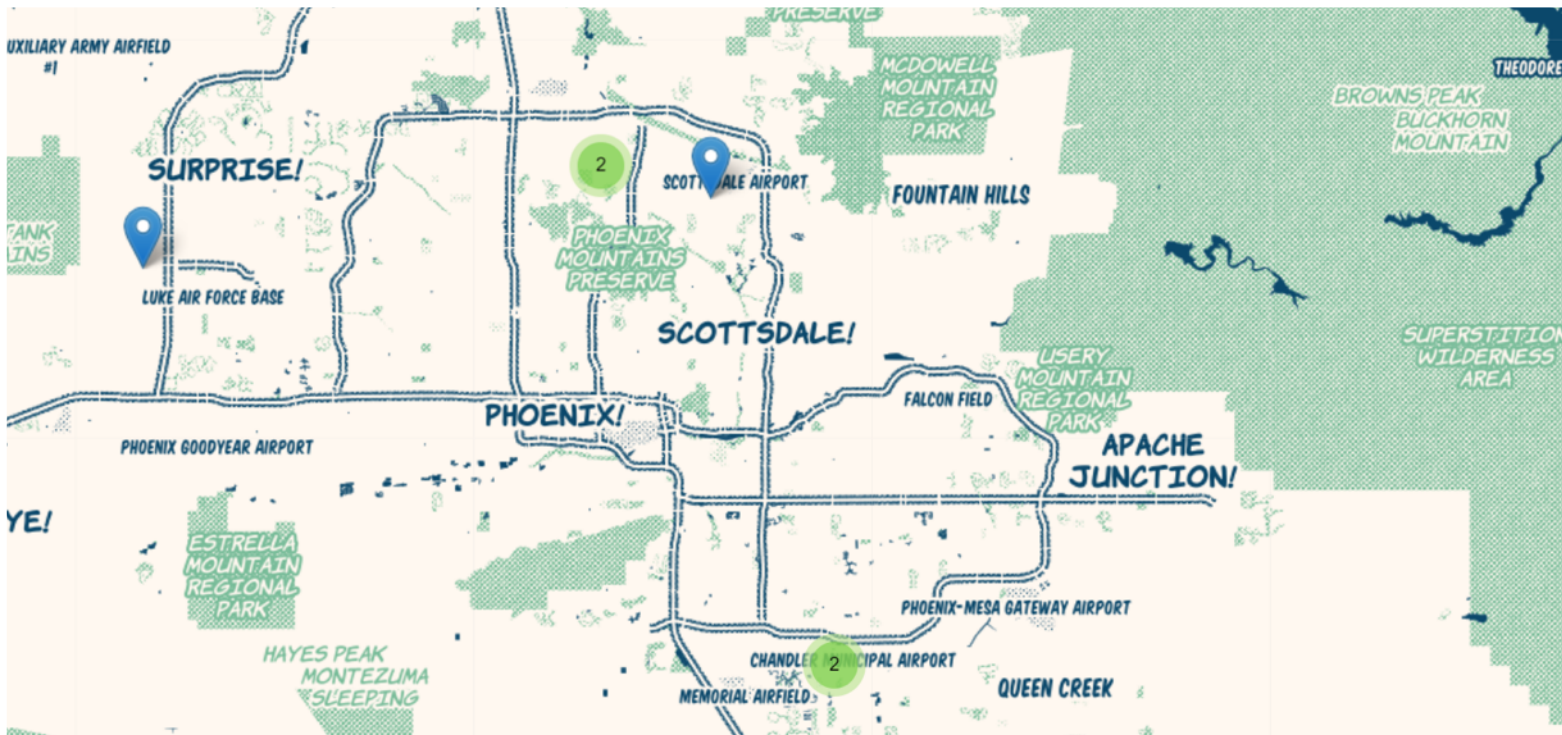
2017

Geographic Look at ICEAA - World



2017

Geographic Look at ICEAA - Phoenix



2017

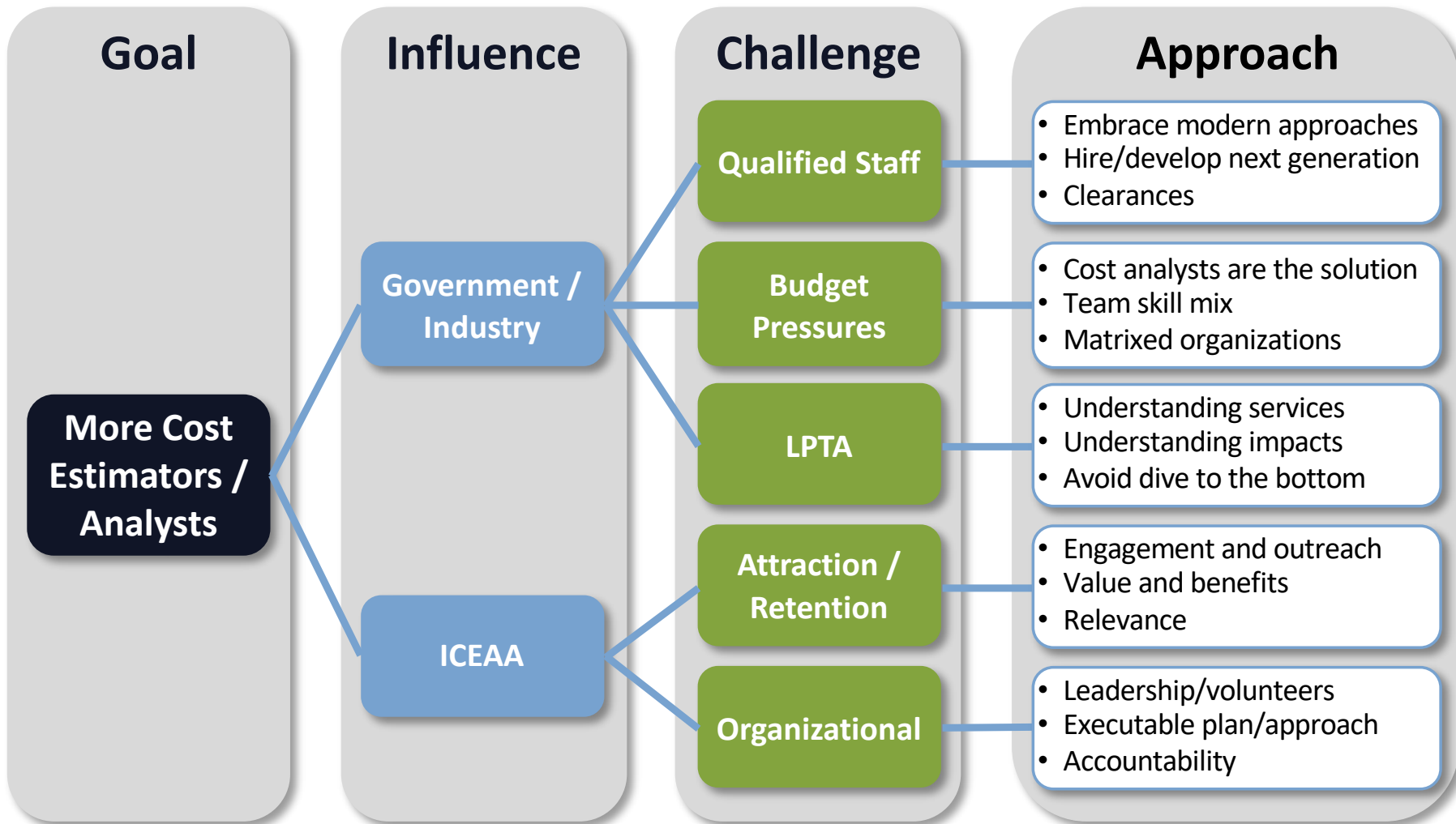
Why is ICEAA Membership Declining?

- Limited Pool of Analysts – Barriers to Entry
 - College recruits not familiar with cost estimating
 - Companies can hire only so many junior analysts – developing a pipeline is difficult
 - Hard to get into cost estimating once past the college recruiting stage
 - Many contracts require security clearances
 - Average clearance investigation time is increasing
 - Contracts need “directly applicable experience”

Why is ICEAA Membership Declining?

- Perceived Lack of Value
 - Changing needs of members
 - Certification not usually recognized/required by contracts (as opposed to PMP)
 - Limited awareness and applicability of CCEA outside of niche career paths
 - Delivery method of testing and training not updated or easy for members to participate

Next Steps/Recommendations



Government/Industry Influence Areas

- Increase Qualified Staff
 - Embrace Modern Approaches
 - Hire and Develop the Next Generation
 - Clearances

Government/Industry Influence Areas

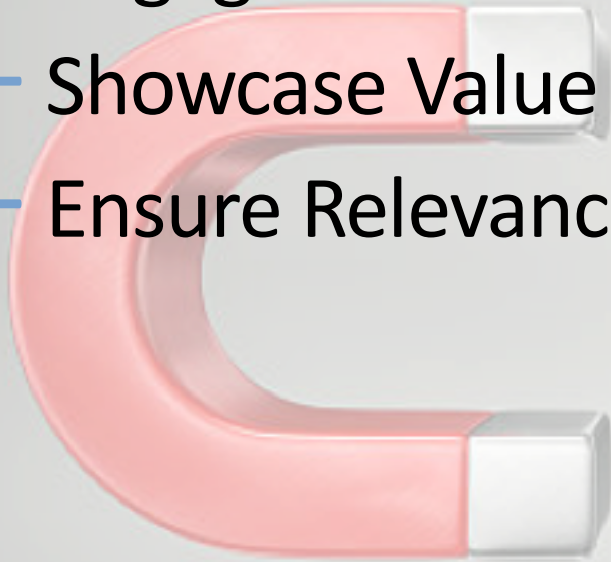
- Budget Pressures
 - Cost Analysts are the Solution
 - Team Skill Mix
 - Matrixed Organizations

Government/Industry Influence Areas

- Lowest Price Technically Acceptable (LPTA)
 - Understanding Services Cost Analyst Provide
 - Understanding Impacts of LPTA
 - Avoid the Dive to the Bottom

ICEAA Influence Areas

- Attraction and Retention
 - Engagement and Outreach
 - Showcase Value and Benefits
 - Ensure Relevance



ICEAA Influence Areas

- Organizational
 - Leadership and Volunteers
 - Executable Plan and Approach
 - Accountability

Summary/Closing

- Continue ongoing actions and initiatives
- “This has been tried before” doesn’t mean it can’t be attempted again
- Partnership between ICEAA, Government, and Industry with a common vision
- Challenges exist but with vision, defined goals, crawl/walk/run planning, some or all goals are achievable