



Hospital Building Safety Board
Collaborative Inspection Approach to Field Inspections
(formerly, "Inspect-to-Pass Approach to Field Inspections")
Webinar Development Subcommittee
of the Education and Outreach Committee

AGENDA
March 27, 2025
10:00 a.m. – 4:00 p.m.

The Subcommittee may not discuss or act on any matter raised during the public comment section that is not included on this agenda, except to place the matter on a future meeting agenda. (Government Code §§ 11125, 11125.7, subd. (a).)

Locations:

[2020 West El Camino Ave, Conference Room 930, Sacramento, CA 95833](#)
[355 South Grand Avenue, Conference Room 2000, Los Angeles, CA 90071](#)
[Teams Meeting Access](#); Meeting ID: 227 570 858 933; Passcode: j3ku6PD3
Call in: (916) 535-0978; Phone Conference ID: 776 317 176#

- Item #1 Call to Order and Welcome
Facilitator: Michael Davis, CHI, CEO Emeritus, DavisHBC, Inc.; Subcommittee Chair (or designee)
- Item #2 Roll Call and Meeting Advisories/Expectations
Facilitator: Veronica Yuke, Manager, HCAI; Executive Director (or designee)
- Item #3 Progress review of the current [presentation outline](#) subsections
- Discuss content for the following:
 - a. Ownership – Gary Dunger
 - b. Design Professional of Record – Scott Mackey
 - c. Contractor of Record/Sub-Contractor – Cody Bartley
 - d. Inspector of Record/Testing Lab – Michael Davis
 - e. OSHPD and Field Staff – Monica Colosi
 - Discussion and public input
- Facilitator: Michael Davis (or designee)*

Item #1

Call to Order and Welcome

Facilitator: Michael Davis, CHI, CEO Emeritus, DavisHBC, Inc.;

Subcommittee Chair (or designee)

Item #2 Roll Call and Meeting Advisories/Expectation
*Facilitator: Veronica Yuke, Manager, HCAI; Executive Director (or
designee)*

Item #3

Progress review of the current presentation outline subsections

- Discuss content for the following:
 - a. Ownership – Gary Dunger
 - b. Design Professional of Record – Scott Mackey
 - c. Contractor of Record/Sub-Contractor – Cody Bartley
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 - e. OSHPD and Field Staff – Monica Colosi
- Discussion and public input

Facilitator: Michael Davis (or designee)

Item #3a – Progressive review of the the current presentation outline subsections

- Discuss content for the following:
 - **Ownership**
 - Discussion and public input

Facilitator: Gary Dunger (or designee)

Item #3b – Progressive review of the the current presentation outline subsections

- Discuss content for the following:
 - **Design Professional of Record**
 - Discussion and public input

Facilitator: Scott Mackey (or designee)

Item #3c – Progressive review of the the current presentation outline subsections

- Discuss content for the following:
 - **Contractor of Record/Sub-Contractor**
 - Discussion and public input

Facilitator: Cody Bartley (or designee)

Item #3d – Progressive review of the the current presentation outline subsections

- Discuss content for the following:
 - **Inspector of Record/Testing Lab**
 - Discussion and public input

Facilitator: Michael Davis (or designee)

To the IOR and Testing Lab (Michael Davis)

a. Preview:

- i. What does “inspect-to-pass” mean for any inspector (IOR or special)
- ii. What does “inspect-to-pass: NOT mean
- iii. What are the principles that serve as a foundation of the “inspect-to-pass” approach?
- iv. And how are these principles put into action?

To the IOR and Testing Lab (Michael Davis)

- a. The Mental Attitude with which you approach your inspection duties:
 - i. How do you view your role within the overall framework of the construction team?
 - ii. How do you view the contractor?
 - 1. The enemy?
 - 2. The "dark side"?
 - 3. The opposition?
 - iii. How do you view the designers?
 - 1. According to Title 24 Part 1, you take direction from them.
 - iv. How do you view the owners?
 - 1. This is who you work for, they pay you.
 - 2. Therefore, you have a fiduciary responsibility to them.
 - v. How do you view OSHPD and the field staff?
 - 1. Even though you may not see eye-to-eye with them all the time, their position deserves your respect.
 - 2. On the other hand...
 - 3. You do NOT work for OSHPD.
 - 4. You are NOT the AHJ.
 - 5. You are licensed by OSHPD and have a duty to your license, to OSHPD and to the people of the state of California.
 - vi. How do you view the project as a whole?
 - 1. Do you ever find yourself frustrated and you wish for the IR's to fail?
 - vii. KEY: How do you view your role as IOR on the project?

To the IOR and Testing Lab (Michael Davis)

- a. What does the phrase..."inspect to pass"...mean to you?
 - i. When some inspectors here this, they errantly form up the wrong idea and "tune out"
- b. What it is NOT:
 - i. It does not mean that the IOR is giving the contractor a free pass to do things incorrectly.
 - ii. It does not mean that the IOR is looking the other way, or turning a blind eye to non-compliant work.
 - iii. It does not mean that the IOR is going to be a pushover.
 - iv. It does not mean that an inspection will pass when the actual work installed does not match the approved construction documents or does not comply with minimum code requirements.
 - v. It does not mean that OSHPD now wants IORs to pass Inspection Requests at all costs.

To the IOR and Testing Lab (Michael Davis)

- a. What it is:
 - i. Inspect to Pass is the mental attitude with which you approach your inspection duties.
 - ii. Inspect to Pass is a philosophical approach to inspection.
 - iii. When that philosophical approach is put into action, Inspect to Pass is the embodiment of the collaborative, communicative, pro-active (anticipatory) approach to inspection.
 - iv. Inspect to Pass is project centric, NOT ego centric.

To the IOR and Testing Lab (Michael Davis)

- a. The Principles of the Philosophical Approach of the Inspect-To-Pass (Collaborative) Approach:
 - i. Collaboration:
 - 1. To collaborate means to work jointly with others or together with them, especially in an intellectual endeavor. It involves cooperation and contribution to a joint project or the attainment of a common goal.
 - 2. It takes a team of people to build a hospital (or even remodel one)
 - 3. How the IOR should collaborate
 - a. As the IOR, you are part of that team.
 - i. An important part
 - ii. But just a part
 - b. You are paid by the owner and therefore have a fiduciary responsibility to ownership.
 - i. Responsibility to make sure owner is getting the building they are paying for.
 - ii. Responsibility to be a good steward of ownerships money:
 - 1. Honest in our billing and hours
 - 2. Be fiscally responsible in scheduling IOR inspections and special inspections
 - 3. Never by action or omission of action, cause the job to go on longer than necessary in order to make more money
 - c. You are licensed by the state and therefore have a moral responsibility to the people of California to see to it that the hospital is constructed in a safe manner.
 - d. By statute, you have the legal responsibility to work under and take direction from the DPOR.
 - e. Also, by statute, you are obligated to report to the OSHPD field staff.
 - i. Openly and willingly share your reports and other information.
 - ii. Follow the direction of the ISU in matters of conduct, practice and conflict of interest.

To the IOR and Testing Lab (Michael Davis)

i. Communication:

1. Should be open and transparent at all times.
2. Should always be honest.
3. Should be timely. (More on this in next section)
4. Delivering Bad News:
 - a. Always best when done tactfully
 - b. Without malice or celebration
 - c. How you say something can dramatically impact how the listener responds to what you say.
 - d. EXAMPLE
5. The project delivery method can influence how chains of communication go, but do not affect areas of responsibility.

To the IOR and Testing Lab (Michael Davis)

- i. Proactive (anticipatory):
 - 1. As an IOR, you should be performing observation walks of your projects on a regular basis.
 - a. Large projects - walk them twice a day
 - b. Small project - regularly stop by and take a look at progress
 - 2. Be in constant communication with the superintendent regarding any potential deficiencies, deviations, or non-compliance.
 - a. EXAMPLE
 - 3. If you are truly proactive, and the contractor is responsive, the IR should just be just a formality
 - a. EXAMPLE

To the IOR and Testing Lab (Michael Davis)

a. How the Philosophy Is Put Into Action:

i. Pre-Construction Phase

1. Read the specs for the upcoming work. Get familiar with the requirements as called out therein.
2. Review approved submittals to determine how the systems come together.
3. Become thoroughly familiar with the approved drawings.
4. Seek clarification from the DPOR on any confusing details.

To the IOR and Testing Lab (Michael Davis)

i. Construction Phase:

1. Continually watch work being installed in the field and ask questions when something doesn't look right.
 - a. EXAMPLE
2. Look over the TIO every day to insure that nothing is being missed.
3. Hold Mini Pre-Construction meetings well in advance of the start of any new trade.
4. Hold Pre-Installation meetings with the general superintendent and trade foremen to review plans, details, specs, and shop drawings to establish expectations.
5. Recommend that the contractor produce mock-up installations so that everyone can evaluate it and become familiar with it and with expectations.
6. Never weaponize your inspections as a way to get back at the contractor or the project.
 - a. Personality conflict with the contractor.
 - b. Agitation over slow payment by the hospital.
7. Do not direct the contractor, but be willing to share knowledge and experience.

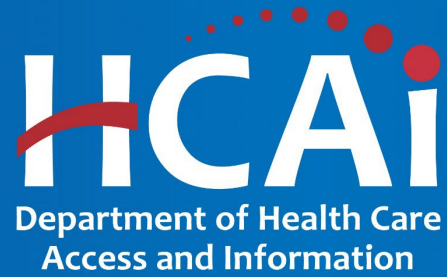
To the IOR and Testing Lab (Michael Davis)

- i. Close-Out Phase:
 - 1. ?
- ii. What makes "Inspect to Pass" challenging (this is directed to everyone)
 - 1. Uncooperative contractor
 - 2. Inexperienced contractor
 - 3. Uninvolved DPOR
 - 4. Ownership pushing speedy inspection approvals over compliance
 - 5. Ownership not being willing to pay for a sufficient number of IORs
 - 6. If the IOR feels bullied or pressured to pass inspections

Item #3e – Progressive review of the the current presentation outline subsections

- Discuss content for the following:
 - **OSHDP and Field Staff**
 - Discussion and public input

Facilitator: Monica Colosi (or designee)

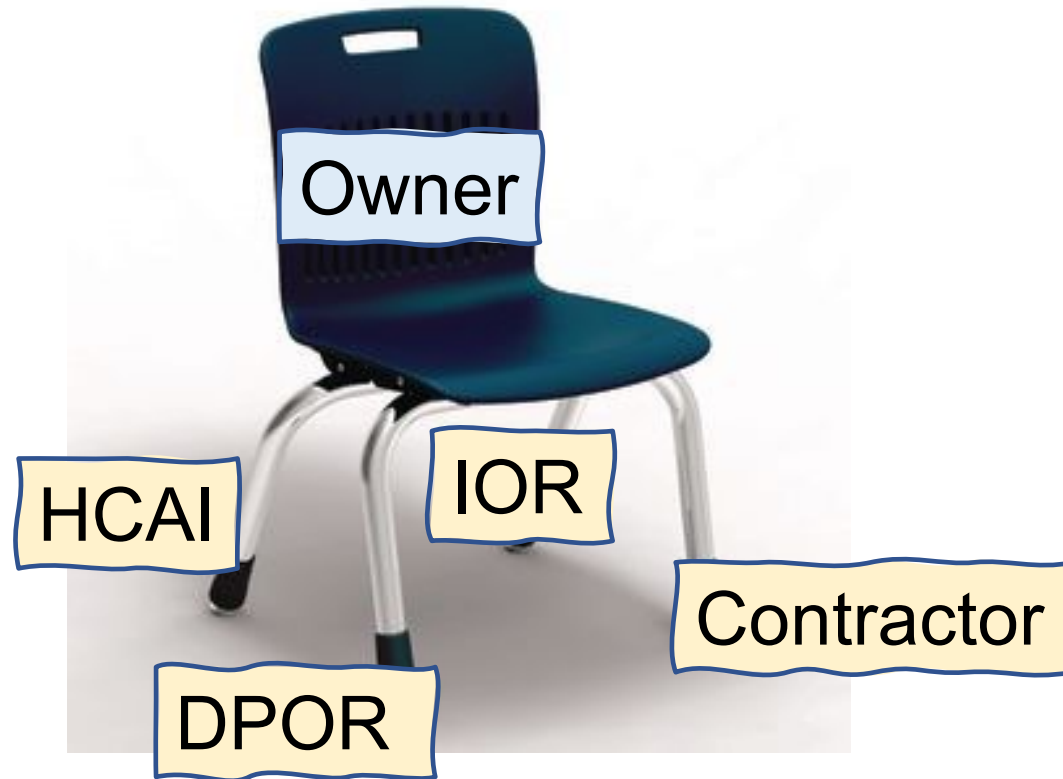


Collaborative Inspection Approach

Inspection Services Unit



Somebody said: “A project team is like a chair, Four legs”.



Collaborative Inspection Approach



INSPECTION 2022 CAC 7-144	OBSERVATION	Verified Compliance Report 2022 CAC 7-151
<u>Reports:</u>	<u>Reports:</u>	<u>VCR:</u>
Inspector(s) Of Record	Design Professionals 7-141	Design Professionals
Special Inspector	Office CAC 7-147	Contractor or Owner/Builder
Approved Agency	Contractors, Subs, Owner, etc	Approved Agency
Note: IORs verify Special Inspection	they are encouraged to provide observation	Special Inspector(s)
		Inspector(s) Of Record

Today's Tip:

OSHDP Field Staff will strive for consistency by enforcing terminology that aligns with the regulations:

'Inspection': To be used by Approved Agency and/or Special Inspectors and IORs

'Observation': To be used by all other project stakeholders...e.g.-OSHDP Field Staff and Design Professional.

The Big Idea:

During construction, inspection reports/daily reports are used by the Approved Agency and/or Special Inspectors and IORs; while other project stakeholders provide observation reports.

Do not confuse the above reports with the Verified Compliance Report (VCR).

VCRs are submitted to the Office during a period of work/milestone by Design Professionals, Contractor or Owner/Builder, Approved Agency, Special Inspectors, and IORs reporting their personal knowledge of the completion of the specific portion of the project. CAC 7-151.



HCAI Field TIP OF THE DAY

Subject: Inspection vs Observation

Authored By: Joe LaBrie
HCAI ISU RCO

Construction Matters:

It is common to misuse words like Inspection and Observation.

The two terms have very different meaning and should be recognized accordingly.

The regulations clearly apply these words differently with intentional application for each project stakeholder.

The word 'Observation' has been used interchangeably with the word 'Inspection' on forms and reports used by many Inspectors of Record (IOR) and Special Inspectors in several instances throughout the State.



Inspection Services Unit



The purpose of the Inspector of Record (IOR) Daily Report is to “maintain field records of construction progress for each day or any portion of a day that they are present at the project site location.” 2022 California Administrative Code (CAC), Title 24 of the California Code of Regulations, Section 7-145(a)6.


FOR DAILY REPORT TEMPLATE		FOR DAILY REPORT TEMPLATE
Inspector of Record (IOR): Daily Report Template		
This is a voluntary template. KPIHS that would like to use this form must send the completed form to the California Public Health Services as requested by the California Building Standards Code. CAC 7-1450(a).		
Date:	Click to go to help text for date.	6. If applicable, provide copies of all certificates, logs, marks, or other evidence of material testing and testing procedures and testing results as requested by the California Building Standards Code. CAC 7-1450(a).
Time: Arrival Time	Click to go to help text for time.	6. Concrete report: If applicable, including time and date of placing concrete, Slag and date of testing and forms and drawings and drawings of concrete. Slag and date of testing and forms, time, date and method of correction of defects. CAC 7-1450(b).
Departure Time:	Click to go to help text for time.	
Inspector of Record (IOR):	Click to go to help text for name.	7. Markers: If applicable, including time and date of placing concrete, Slag and date of testing and forms and drawings and drawings of concrete. Slag and date of testing and forms, time, date and method of correction of defects. CAC 7-1450(b).
Certification No.:	Click to go to help text for number.	8. Markers: If applicable, including time and date of placing concrete, Slag and date of testing and forms and drawings and drawings of concrete. Slag and date of testing and forms, time, date and method of correction of defects. CAC 7-1450(b).
LOCAL Project No.:	Click to go to help text for number.	
<p>The purpose of the CDR Daily Report is to facilitate the transfer of construction information from day-to-day to any person at any point in the project or construction.</p> <p>2022</p> <p>California Building Standards Code (CAC), Title 24 of the California Code of Regulations, Section 7-1450</p>		9. Markers: If applicable, including time and date of placing concrete, Slag and date of testing and forms and drawings and drawings of concrete. Slag and date of testing and forms, time, date and method of correction of defects. CAC 7-1450(b).
1. Inspector of Record (IOR):	Click to go to help text for name.	10. Markers: If applicable, including time and date of placing concrete, Slag and date of testing and forms and drawings and drawings of concrete. Slag and date of testing and forms, time, date and method of correction of defects. CAC 7-1450(b).
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68. Time: Departure Time	Click to go to help text for time.	
69. Inspector of Record (IOR):	Click to go to help text for name.	
70. C		

Using the Voluntary Template helps IORs to provide the required information, per CAC 7-145(a)4 and CAC 7-145(a)6. This is not a mandatory template. IORs that decide to use their own template shall meet the minimum code requirement. Click the [link](#) to get to the template

To support IORs, HCAI Inspection Services Unit (ISU) is providing the Voluntary Template. Additional documentation may be needed to support the daily report and can be added as an attachment.

If you have any question, please email isu@hcai.ca.gov
If you would like to know more, please register [here](#) for the Field Brief Advice (FBA) on
July 10th at 1PM.

Collaborative Inspection Approach



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Forms, Applications, & Reminder Lists

TABLE OF CONTENTS

1. [Plan Review & Construction](#)

2. [Other](#)

3. [Testing, Inspection, and Observation \(TIO\) Program](#)

A. [2022 Testing, Inspection, and Observation Form](#)

B. [2019 Testing, Inspection, and Observation Form](#)

C. [California Energy Code Forms](#)

D. [2016 Testing, Inspection, and Observation Form](#)

E. [2013 Testing, Inspection, and Observation Form](#)

F. [2022 Prefabrication Testing, Inspection, and Observation Form](#)

4. [Fire and Life Safety \(ELS\)](#)

A. [Forms](#)

B. [Reminder Lists](#)

5. [Plan Review Reminder Lists](#)

A. [California Building Standards Code \(CBCS\)](#)

B. [eServices Reminder Lists](#)

Collaborative Inspection Approach

IDR DAILY REPORT TEMPLATE	
Inspector of Record (IOR) DAILY REPORT TEMPLATE	
This is a voluntary template. IOR(s) that would like to use their own format need to provide the template's content as stipulated in the regulations.	
Date:	Click or tap here to enter a date.
Arrival Time:	Click or tap here to enter text.
Departure Time:	Click or tap here to enter text.
Inspector of Record (IOR):	Click or tap here to enter text.
Certification No.:	Click or tap here to enter text.
HCAI Project No.:	Click or tap here to enter text.
<p>The purpose of the IDR Daily Report is to "Maintain field records of construction progress for each day or any portion of a day that they are present at the project site location". 2022 California Administrative Code (CAC), Title 24 of the California Code of Regulations, Section 7-145(a)5.</p> <ol style="list-style-type: none">Summary of work in progress. CAC 7-145(a)5. Click or tap here to enter text.Note deficiencies in the construction. CAC 7-145(a)5. Click or tap here to enter text.Note deviations from the approved construction documents. CAC 7-145(a)6. Click or tap here to enter text.Inspections performed, TIO Reference #. CAC 7-145(a)4. Click or tap here to enter text.Document the time and date of all significant correspondence with the contractor regarding incomplete work, potential deficiencies or deviations which require the contractor's attention and could potentially affect the timely and compliant completion of the project. CAC 7-145(a)6. Click or tap here to enter text.List of notification to the contractor, in writing, of deviations from the approved construction documents or new construction not in compliance with the California Building Standard Codes, which have not been immediately corrected by the contractor. CAC 7-145(b). Click or tap here to enter text.Document the date, time and method of correction for any noted deficiencies or deviations. CAC 7-145(a)6. Click or tap here to enter text.	
Revised May 22, 2024 Page 1 of 2	

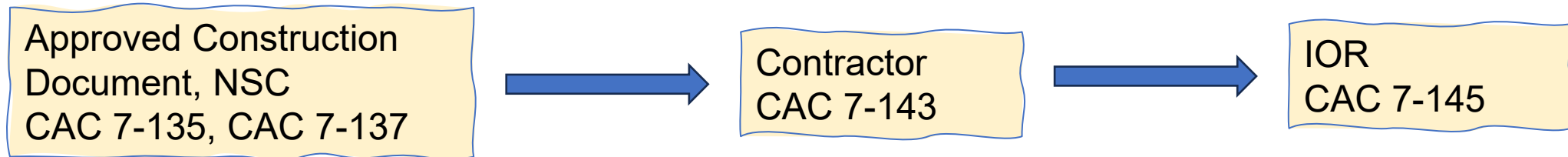
IDR DAILY REPORT TEMPLATE	
<ol style="list-style-type: none">If applicable, provide copies of all certificates, tags, marks, or other evidence of material properties and/or manufactured components as required by the California Building Standards Code. CAC 7-145(a)6A. Click or tap here to enter text.Concrete record, if applicable, including time and date of placing concrete, time and date of removal of forms and shoring in each portion of the structure, location of defective concrete, and time, date and method of correction of defects. CAC 7-145(a)6B. Click or tap here to enter text.Identification marks of welders, lists of defective welds, and manner of correction of defects and other related events, as applicable. CAC 7-145(a)6C. Click or tap here to enter text.List of test reports of all nonconforming materials or defective workmanship and the corrective actions taken, as applicable. CAC 7-145(a)6D. Click or tap here to enter text.Names and certificate numbers of all special inspectors who perform work both on- and off-site, as applicable. CAC 7-145(a)6E. Click or tap here to enter text.When driven piles are used for foundations, document the location, length, and penetration under the last ten blows for each pile and description of the characteristics of the pile driving equipment. CAC 7-145(a)6F. Click or tap here to enter text.Log of changes to the work prepared by the architect or engineer in responsible charge required by Section 7-153(e). CAC 7-145(a)6G. Click or tap here to enter text.	
Revised May 22, 2024 Page 2 of 2	



Collaborative Inspection Approach

Oversight-To-Pass:

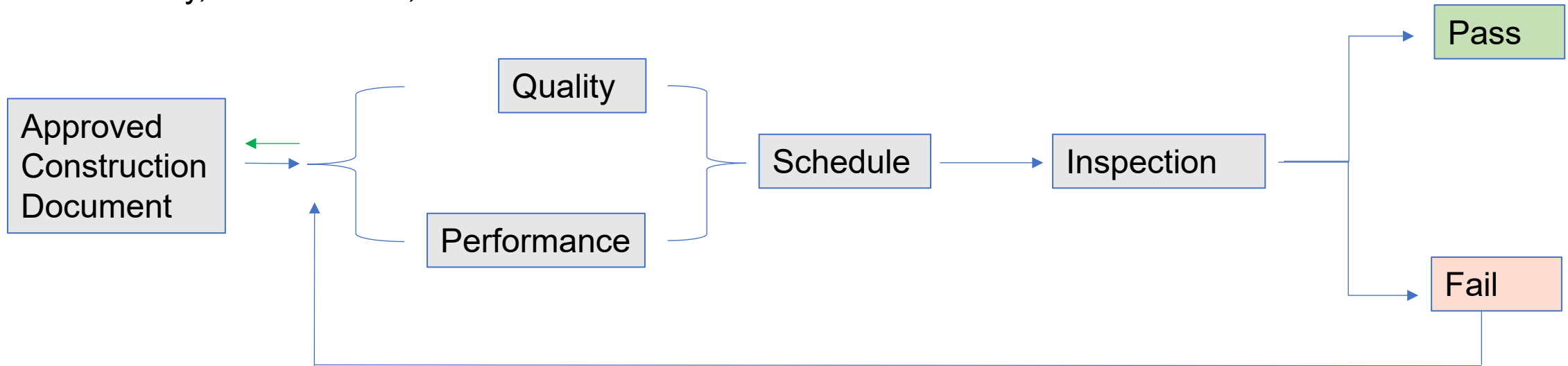
- Approved Construction Document with the rest of documentation. CAC 7-135, CAC 7-137
- Contractor to build per Approved Construction Document. CAC 7-143
- Inspector to inspect contractor work per approved document. CAC 7-145



Collaborative Inspection Approach

Do you have an “inspect to pass” mentality?

Quality, Performance, Schedule



Item #4

Plan for future meetings and practice sessions

- Review subcommittee meeting schedule and outline goals for each meeting
- Discussion and public input

Facilitator: Michael Davis (or designee)

Item #4 – Plan for future meetings and practice sessions

- This sub-committee meets:
 - April 24, 2025
 - Additional dates TBD after assessment of progress on April 24, 2025
 - Will need to develop the Introduction and Conclusion
 - Will need to add Examples and Experiences to each section
 - Will need a “Rough” practice session
 - Will need “Refined” practice sessions

Facilitator: Michael Davis (or designee)

Item #5 Comments from the Public/Subcommittee Members on Issues not on this Agenda

The Subcommittee will receive comments from the Public/Subcommittee Members. Matters raised at this time may be taken under consideration for placement on a subsequent agenda.

Facilitator: Michael Davis (or designee)

Future Collaborative Inspection Approach to Field Inspections Webinar
Development Subcommittee meeting:

- April 24, 2025

Item #6

Adjournment