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**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**

**February 27, 2025
10:00 a.m. – 4:00 p.m.**

Locations:

2020 West El Camino Ave, Conference Room 930, Sacramento, CA 95833
355 South Grand Avenue, Conference Room 1901, Los Angeles, CA 90071

Subcommittee Members Present

Michael Davis, Subcommittee Chair
Bert Hurlbut
Scott Mackey

HCAI Staff Present

Chris Tokas
Richard Tannahill
Monica Colosi
Joe LaBrie
Andia Farzaneh

HBSB Staff Present

Veronica Yuke, Executive Director
Marcus Palmer
Evelt Torres

- 1 **1. Call to Order and Welcome**
- 2 **Facilitator:** Michael Davis, CHI, CEO Emeritus, DavisHBC, Inc.; Subcommittee
- 3 Chair (or designee)
- 4 Michael Davis called the meeting to order at 10:00 a.m. He welcomed attendees
- 5 and acknowledged the transition from the "Inspect-to-Pass" concept to a broader
- 6 "Collaborative Inspection Approach."

2. Roll Call and Meeting Advisories/Expectations

Facilitator: Veronica Yuke, Manager, HCAI; Executive Director (or designee)

Veronica Yuke welcomed everyone to the meeting, conducted a roll call, and confirmed a quorum. She noted that remote attendance does not count toward quorum.

3. Progress review of the current presentation outline subsections

Facilitator: Michael Davis (or designee)

Michael Davis introduced the item and began by restating the content development assignments from the prior subcommittee meeting:

- Michael Davis: Inspector of Record (IOR) and Testing Lab
- Gary Dunger: Ownership
- Scott Mackey: Design Professional of Record
- Cody Bartley: Contractor and Subcontractors
- Monica Colosi (presenter) and Joe LaBrie: OSHPD and Field Staff

Michael Davis explained that he will present a format that all presenters can follow. He outlined four discussion points:

1. What the collaborative inspection approach means to the role.
2. Why it matters.
3. How the role demonstrates it.
4. What the common obstacles are and how to overcome them.

Michael Davis began his content for IOR and Testing Lab. He said the IOR must proactively collaborate with contractors and design professionals to ensure first-time inspection success and code compliance. He stressed the IOR cannot operate in isolation. He emphasized that the IOR cannot act as a lone decision-maker and must avoid weaponizing inspections.

Michael Davis stated that the IOR is not the interpreter of the drawings—under Title 24, Part 1, that is the responsibility of the architect. He gave examples of when IORs failed to collaborate, including IORs who turned inspections into competitions to find the biggest problem each day and another who openly stated “I don’t trust architects” during a team meeting. He noted that the IOR must be part of a collaborative effort, not a separate authority.

He identified three key obstacles: Inexperienced contractors, Absent or disengaged design professionals, and Owners pressuring the IOR to accept noncompliant work.

Discussion & Public Input:

- Michael Davis said he will use real project examples in his presentation and asks for feedback from the subcommittee.
- Scott Mackey supported the structure and presentation but pointed out that the Testing Lab role needs more attention. He encouraged Michael Davis to include specific examples of testing lab contributions and challenges.
- Bert Hurlbut recommended opening and closing the presentation with benefits for the owner. He said the collaborative approach leads to better quality, fewer delays, and successful inspections—and that owners ultimately reap the rewards.
- Michael Davis agreed. He called it a “sandwich structure”: benefits up front and at the end, technical content in between.
- Scott Mackey confirmed he will use that model in his introduction. He plans to cover project and owner benefits, project cost impacts, the definition of a successful inspection, and the importance of shared responsibility.
- Joe LaBrie asked whether the presentation should explicitly include what happens when teams don’t collaborate—delays, cost overruns, bad relationships.
- Scott Mackey responded that real examples will cover those outcomes without needing a negative section. He wants to avoid leading with consequences and prefers to keep the message positive.
- Michael Davis agreed and shared two real examples. In the first, two IORs created a contest to outdo each other in identifying project issues, which poisoned the culture and resulted in both being removed. In the second, an IOR’s statement about mistrusting architects directly contradicted their role under the architect’s direction. He said these cases highlight the need for a reset in expectations.
- Michael Davis transitioned to the second bullet point: the order in which the webinar content will be presented.
- Scott Mackey said his section on the Design Professional of Record currently comes first. He said he plans to deliver the introduction and set the tone for the webinar by discussing ownership and project benefits, cost implications, and the collaborative roles of all parties.
- Michael Davis said he originally placed the design professional first based on Chris Tokas’ earlier comments about the design professional’s responsibility for overall project success. But he noted that owners initiate the process and suggested revisiting the presentation sequence.

- 1 • Bert Hurlbut asked about the target audience for the webinar. He wanted
2 to clarify whether it's mostly IORs or a broader stakeholder mix.
- 3 • Chris Tokas explained that if only IORs attend, the subcommittee has
4 failed. He compared construction to manufacturing and noted the key
5 difference is that construction projects have separate parties for design,
6 construction, and oversight. He added that the owner delegates
7 responsibility to the design professional and that the design professional
8 must remain engaged through completion. He emphasized that the
9 architect or engineer of record holds statutory authority and cannot hand
10 it off.
- 11 • Joe LaBrie agreed but raised a challenge. He said some owners are
12 disengaged and only want a completed facility. In those cases, pressure
13 is placed on design professionals to approve substandard work, and too
14 often they comply. He called for a paradigm shift—he wants design
15 professionals to stop accommodating and start leading. He said doing
16 things “the way we’ve always done them” no longer works.
- 17 • Monica Colosi suggested the presentation should start with Ownership.
18 She explained that every role on a project exists because the owner
19 initiates the project. She agreed with presenting the owner’s perspective
20 first and supported holding additional webinars tailored to specific roles.
- 21 • Scott Mackey agreed and said he’ll thank the owner in his section for
22 hiring the right professionals and emphasize the design professional’s
23 leadership role. He said design professionals must act as the “captain of
24 the team” and lead with strength, not just compliance.
- 25 • Chris Tokas supported that point, quoting Steve Jobs: “Your job is not to
26 be easy on people; your job is to make them better.” He said even in
27 design-build, the responsibility still rests with the design professional.
- 28 • Joe LaBrie said these conversations are difficult but necessary. He
29 supported having them.
- 30 • Michael Davis proposed a new presentation order based on project
31 workflow: Ownership, Design Professional of Record, Contractor,
32 Inspector of Record / Testing Lab, and OSHPD Field Staff.
- 33 • Scott Mackey agreed with the new order. He said it followed the actual
34 sequence of a construction project.
- 35 • Joe LaBrie said that although the regulations put authority in the hands of
36 the design professional, in reality, many projects give control to the
37 contractor. He said architects must reassert their authority when this
38 happens.

- Chris Tokas agreed and stated that OSHPD cannot perform its role without the IOR. He reminded the subcommittee that Title 24 and statute require the architect or engineer of record to maintain regulatory responsibility throughout the construction process.

Informational and Action Items

Informational:

- Michael Davis shared his plan to apply a consistent four-question structure to all presentation segments.
- Scott Mackey, Bert Hurlbut, Monica Colosi, and Joe LaBrie each expressed support for the revised presentation order.
- Scott Mackey confirmed he would focus the introduction on defining success and value to owners.
- Michael Davis agreed to revise the IOR section to include more robust Testing Lab content based on feedback from Scott Mackey.
- Joe LaBrie's point about the consequences was acknowledged and will be integrated through storytelling, not as a standalone topic.

Action:

- Michael Davis will revise the presentation outline to reflect the new workflow-based presentation order.
- Michael Davis will revise his assigned content on the Inspector of Record / Testing Lab to include expanded discussion of the Testing Lab, based on feedback from Scott Mackey.
- Scott Mackey will develop the introduction and the section on the Design Professional of Record using the four-question structure and the "sandwich" format emphasizing project and owner benefits.
- Michael Davis, Scott Mackey, Gary Dunger, Cody Bartley, Monica Colosi will continue refining their sections using the agreed structure, with illustrative examples, and be prepared to present updates at a future subcommittee meeting.

Voting:

There was no formal roll-call vote under this subsection. However, an informal consensus was reached on:

- The proposed content structure for each role
- A positive tone focused on collaboration and success
- Inclusion of benefits in the introduction and conclusion
- Integration of obstacles and failures through real-world examples

1 No objections were raised. The subcommittee reached a unanimous consensus
2 to proceed using this format.

3 **Subcommittee Comments**

- 4 • Scott Mackey committed to delivering an opening that defines successful
5 collaboration and emphasizes the leadership role of the design
6 professional.
- 7 • Bert Hurlbut reinforced that ownership should come first and that the
8 presentation must show how the collaborative approach benefits owners.
- 9 • Joe LaBrie pushed for stronger engagement by design professionals and
10 a break from passive practices.
- 11 • Monica Colosi advocated for prioritizing the owner's role and supports
12 exploring future webinars tailored to individual project roles.
- 13 • Chris Tokas closed by reaffirming that architects and engineers bear the
14 statutory responsibility for the built facility, regardless of delivery method.

15 **Public Comments**

16 No public comments were offered or recorded during this section of the meeting.
17

18 **4. Plan for future meetings and practice sessions**

19 **Facilitator:** Michael Davis (or designee)

20 **Discussion and input:**

- 21 • Michael Davis introduced the item and opened the floor to discussion on
22 how the subcommittee should proceed with preparing content for future
23 meetings and potential practice sessions.
- 24 • Michael Davis stated that he would follow up by sharing the updated
25 outline reflecting the revised presentation order discussed under Item #3.
26 He asked whether subcommittee members felt they had sufficient
27 foundation from today's discussion to begin fleshing out their respective
28 sections.
- 29 • Scott Mackey responded that he had what he needed and planned to
30 further develop his section. He stated that he would focus on the "why"
31 behind the collaborative inspection approach and continue building the
32 Design Professional of Record content in alignment with the four-question
33 structure.
- 34 • Michael Davis asked if the subcommittee would like to review refined
35 content at the next meeting or wait until final drafts were ready.
36 Scott Mackey suggested that sharing incremental progress would be

beneficial. He said that early feedback from the subcommittee would help strengthen the final product and ensure alignment across all sections.

- Monica Colosi agreed with Scott Mackey and supported using the next meeting for feedback and content refinement. She emphasized that real-time input from other subcommittee members would help each presenter address potential gaps or missed perspectives.
- Joe LaBrie stated that he looked forward to seeing how each section evolved and agreed with presenting rough drafts at the next meeting. He expressed confidence in the subcommittee's direction and said that continued dialogue would improve the final result.
- Michael Davis confirmed that the subcommittee would aim to review early drafts during the next meeting. He stated that he would update and distribute the outline prior to that meeting, giving everyone a chance to align their content with the revised structure.
- Michael Davis reminded presenters that while final formatting could wait, each section should now begin moving toward complete content, incorporating the agreed messaging structure and tone.

Informational and Action items

Informational

- Michael Davis confirmed he would share the revised outline with the new presentation order before the next meeting.
- Subcommittee members agreed that they would present and review draft content at the next meeting for feedback and refinement.
- Presenters agreed to continue using the four-question structure and to align messaging across sections.

Action

- Michael Davis will update and circulate the presentation outline reflecting the revised structure.
- Michael Davis, Gary Dunger, Scott Mackey, Cody Bartley, and Monica Colosi will each prepare draft versions of their assigned presentation sections to share at the next subcommittee meeting.
- Joe LaBrie will continue to support content development for the OSHPD and Field Staff section.
- Michael Davis will schedule the next meeting to allow time for content review, discussion, and refinement.

Voting

No votes were held or required during this agenda item.

Subcommittee Comments

- Scott Mackey stated that early feedback would be valuable and confirmed he would present a draft of his content at the next meeting.
- Monica Colosi expressed support for collaborative refinement and emphasized the benefit of group input during development.
- Joe LaBrie encouraged continued collaboration and said the process was moving in a positive direction.

Public Comments

No public comments were made or recorded during this agenda item.

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

Facilitator: Michael Davis (or designee)

Michael Davis opened Agenda Item #5 and invited comments from members of the public and subcommittee members regarding any issues not listed on the meeting agenda.

Discussion and input:

- Joe LaBrie raised a concern about how statutory and regulatory roles assigned to design professionals are often overridden in practice. He explained that although the building code places regulatory authority with the architect and engineer of record, many projects operate as if contractors are in charge. He described this as a widespread industry problem and stated that design professionals often fail to assert their authority, which leads to diminished oversight and compromises to quality.
- Joe LaBrie emphasized that subcommittee members should recognize and address this dynamic in the webinar. He stressed that the webinar should not just promote collaboration but also encourage design professionals to reclaim their leadership role, as required by law.
- Chris Tokas responded in agreement. He stated that the design professional has the legal responsibility for the project from beginning to end. He referenced Title 24 and statutory language, confirming that this authority cannot be delegated to a contractor. Chris Tokas stated that OSHP is depending on the design professional to remain actively engaged throughout the construction process. He affirmed that this is not optional — it is a matter of regulatory compliance.

- Chris Tokas added that although contractors may lead construction activities, they cannot assume the authority or responsibility that legally belongs to the design professional. He stressed that the architect or engineer of record must ensure that the finished building conforms to the approved design and applicable codes.
- Monica Colosi stated that while today's meeting included discussion from multiple stakeholder perspectives, the subcommittee may consider holding additional webinars focused on specific roles. She suggested that more role-specific educational content could further support collaboration and clarity.
- Michael Davis acknowledged the comments and stated that these ideas would be noted for possible inclusion in future meeting agendas or educational initiatives.

Informational and Action Items

Informational

- Joe LaBrie highlighted a persistent industry issue in which contractors are treated as the de facto authority on projects, despite the code placing responsibility with the design professional of record.
- Chris Tokas confirmed that this issue is a violation of statutory and regulatory requirements. He restated that the design professional holds non-delegable responsibility for project compliance under Title 24.
- Monica Colosi proposed developing role-specific webinars to further address the needs of distinct stakeholder groups and support collaborative practices.

Action

- No formal action items were assigned during this agenda item, but Michael Davis acknowledged the suggestions and stated they would be considered for future subcommittee agendas or initiatives.

Voting

No votes were held or required during this agenda item.

Subcommittee Comments

- Joe LaBrie urged the subcommittee to use the webinar as an opportunity to encourage design professionals to reassert their leadership.
- Chris Tokas reiterated that statutory authority belongs to the design professional, not the contractor, and affirmed the regulatory obligation for active oversight.

- 1 • Monica Colosi encouraged developing additional, role-specific webinars
2 to deepen engagement and support educational outreach.

3 **Public Comments**

4 No public comments were made or recorded during this agenda item.

5

6 **6. Adjournment**

7 Michael Davis adjourned the meeting at 11:39 a.m.