

“Collaborative Inspection Approach” Webinar Presentation Outline (formerly: Inspect-To-Pass)

- I. Introduction (arouse interest, break down barriers) (Scott Mackey)
 - a. What is a successful inspection?
 - i. It’s an inspection that is approved by the **inspector (IOR)** on the first pass.
 - ii. That inspection verifies that the work put in place by the **contractor** matches the approved construction documents and is code compliant.
 - b. Successful inspections require more than just effort on the part of the IOR
 - i. But owners, designers and contractors can benefit from this information as they play a role in the success of this approach to inspection.
 - ii. Owners are paying for IOR services and have a direct role in the success of the IOR’s activities. The project is theirs and they should have the greatest vested interest in project success.
- II. To Design Professionals (Scott Mackey)
 - a. Design-To-Pass
- III. To the IOR and Testing Agency (Michael Davis)
 - a. Inspect-To-Pass
 - a. The Mental Attitude with which you approach your inspection duties:
 - i. How do you view the contractor?
 - 1. The enemy?
 - 2. The "dark side"?
 - 3. The opposition?
 - ii. How do you view the designers?
 - 1. According to Title 24 Part 1, you take direction from them.
 - iii. 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.
 - iv. 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...
 - a. You do NOT work for OSHPD.
 - b. You are NOT the Authority Having Jurisdiction (AHJ).

- c. You are licensed by OSHPD and have a duty to your license, to OSHPD and to the people of the state of California.
 - v. How do you view the project as a whole?
 - 1. Do you ever find yourself frustrated and you wish for the Inspection Requests (IR) to fail?
 - vi. KEY: How do you view your role as IOR on the project?
- b. What does the phrase "inspect to pass" mean to you?
 - i. When some IORs here this, they errantly form up the wrong idea and "tune out"
- c. 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 cost.
- d. 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.
- e. The Principles of the Philosophical 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 Design Professional of Record (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 Inspection Services Unit in matters of conduct, practice and conflict of interest.
- ii. 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
- iii. 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
- f. How the Philosophy Is Put Into Action:
 - i. Pre-Construction
 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.
 - ii. Construction:
 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 ensure 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.
 - iii. Never weaponize your inspections as a way to get back at the contractor or the project.
 1. Personality conflict with the contractor.
 2. Agitation over slow payment by the hospital.
 - iv. 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
- IV. To Ownership (Gary Dunger)
 - a. Hire-To-Pass
 - b. Hire sufficient number of IORs
 - c. Small cost when compared to the price of the project

- d. Success rates of inspections goes up
 - e. Minimize changes and tear-outs
 - f. Try to view investment in inspection as a cheap insurance policy of project success
- V. To Contractors and Sub-Contractors (Cody Bartly)
 - a. Build-To-Pass
- VI. To the OSHPD Field Staff (Monica Colosi)
 - a. Oversight-To-Pass
 - a. Do you have an “inspect to pass” mentality?
 - b. Do you support your IORs in having an “inspect to pass” mentality?
 - c. We should be guided by a set of principles, not a detailed list of what to do under every possible situation.
 - d. Do not set random, unsubstantiated rules that exclude ownership (or their third-party Project Managers), designers or contractors from project walks or meetings during the field visit.
- VII. Conclusion (motivating call to action)
 - a. ?

OTHER POTENTIAL POINTS TO WORK INTO PRESENTATION

- Not directing the contractor but being willing to share knowledge and experience.
- A measuring stick of the success of Inspect to Pass is a low number of failed inspections.
- Success of "Inspect to Pass" requires cooperation by the contractor. But as an IOR, do your part regardless of the attitude or actions of the contractor.
- IOR is a people business first, a technical business second.
- IORs must be able to handle the pressure of dealing with "shades of gray" verses everything being "black or white".
- Address the importance of early notification of anything you see or note. No waiting until the IR is issued.
- The project delivery method can influence how chains of communication go, but do not affect areas of responsibility.
- Don't be ashamed or embarrassed to be wrong. Everyone makes mistakes. Don't try to save face. No one is perfect. Seeking perfection is egotistical.