Pete Fowler CONSTRUCTION Services, Inc.

Audience Handout Package

Date:	12/12/2025
To:	
From:	Pete Fowler Construction Services, Inc.
Project:	Desktop Reviews for Building Claims Webinar 12/18/2025 (PFCS 24-0928)
Regarding:	Audience Handout Package

Meet the Panel

Pete Fowler

CHIEF QUALITY OFFICER - PETE FOWLER CONSTRUCTION

Pete Fowler is a construction consultant, professional cost estimator, President and Chief Quality Officer of Pete Fowler Construction, a licensed general building contractor in California, Nevada, and Oregon. Pete received a B.S. in Construction Management from CSU, Chico. He has held certifications from AAMA,ASPE, ICBO, and others. Mr. Fowler has published articles in national magazines, has been invited to speak by the most important groups in the building industry (AAMA, APRA, ASPE, ASQ, ASTM, BETEC,CAI, CLM, DBIA, ICC, NIBS, PLRB, RCI, etc.), and has composed and delivered hundreds of educational programs on building inspection & testing, estimating, quality & construction management, project management, and claims & litigation. Pete has experience with successful expert witness testimony, including Federal Court.

David Luxa

EXPERT - PETE FOWLER CONSTRUCTION

Dave Luxa is a construction professional with over 30 years of experience as a licensed general contractor, supervisor, and manager. Throughout his career, he has been responsible for overseeing construction and maintenance in a variety of settings with a strong emphasis on safety. Dave has an extensive history as a contractor for commercial properties. He also holds licenses as a general contractor, electrical contractor, and refrigeration contractor. Dave has studied green building and the LEED rating system at UC Davis. He is a member of the National Fire Protection Association, and holds a certification for HVACR. Dave's unique, wide ranging experience has given him a strong understanding of projects from all angles.

Presentation & Backup Materials

1. Lesson Plan
2. Power Point Slides

Desktop Review for Building Claims Webinar



OFFICES

CALIFORNIA

(949) 240-9971

29122 Rancho Viejo Road, #114
San Juan Capistrano, CA 92675

NEVADA

(725) 333-2365

2470 St Rose Pkwy, Ste 104
Las Vegas, NV 89074

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174 Semoran Commerce Place, #A-109
Apopka, FL 32703

TEXAS

(469) 677-8710

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Desktop Review for Building Claims Webinar

INTRODUCTION

"Building Claims" is a broad term that includes property, premises liability, general liability (GL), construction defect litigation, or construction contract claims. Lawyers call them "a case" when a lawsuit has been filed. Most claims get sorted out with little disagreement, where one party acknowledges having caused damage, everyone agrees to the value, and either they or their insurance company pay. On the other end are large, expensive, contentious claims that require a team of attorneys and experts to sort out.

But there are claims in the middle where our clients need help. They might know their client caused damage, but think the costs are exaggerated. Or they might not be sure their client has liability. These require professional judgement by an experienced building expert who has knowledge of the law and insurance. This is where a "Desktop Review" is valuable. Desktop Review is sometimes called Preliminary Analysis, Level 1 Analysis, or Small Project Protocol They cost $1,500-10,000 and take a day to a week to complete. For claims professionals and defense lawyers our analysis is a "fight or pay" decision tool; it helps them decide "How much to pay vs. how much to fight." For plaintiffs or subrogation attorneys it is a "go/no-go" tool.

PROGRAM OUTLINE

1. Introduction
2. Basic Analysis
3. File Management
4. Interviews & Testimony
5. Estimating or Monetizing
6. Presenting
7. Conclusion

BACKUP MATERIALS

1. Property Damage Claim Analysis Basics by Pete Fowler and Paul Mason
2. Managing Expert Costs by Pete Fowler
3. Understanding & Evaluating Construction Costs for Claims by Pete Fowler
4. Level 5 Estimating by Pete Fowler
5. Insurance Basics for Construction Professionals by Pete Fowler
6. Civil Litigation Basics for Construction Professionals by Pete Fowler
7. Allocation of Responsibility in Construction-Defect Litigation by Pete Fowler

PROGRAM CONTENTS

1. Introduction - 5 Minutes
    A. Who We Are
    B. Presenter Information
    C. Program Introduction
    D. Learning Objectives
    E. Program Outline
2. Basic Analysis - 10 Minutes
    A. Basic Analysis
    B. What we have, know, think, and recommend.
    C. Case Study: The Civil War in 100 Words
3. File Management - 10 Minutes
    A. DIKW: Data > Information > Knowledge > Wisdom.
    B. Pile ==> File ==> Knowledge ==> Solution
    C. Collect, Organize, Index, Summarize, understand (Analyze), Reference, Retrieve and Share
    D. Case Study: 20,000 Documents and Trial on Tuesday
4. Interviews & Testimony - 10 Minutes
    A. Does this sound right?
    B. We Are Not Perry Mason
    C. Interviews, Testimony, Integrating, Referencing and Admissibility
    D. Case Study: It's Too Hard to Be Professional!
5. Estimating / Monetizing - 10 Minutes
    A. Level 5 Estimating
    B. Managing Expert Costs
    C. Costs Should Always Be an Issue
    D. Estimate Analysis & Comparison
    E. Case Study: Residing A Condo Development
6. Presenting - 10 Minutes
    A. Explain it to Pete's Mom
    B. A diagram is worth 1,000 pictures
    C. Levels of Certainty, Presenting & Reporting
    D. Case Study: A Fall at the Mall
7. Conclusion - 5 Minutes
    A. Continuing Education
    B. Backup Materials
    C. Feedback

LEARNING OBJECTIVES

- Explain what Desktop Review is and be familiar with common alternative names for this process.
- Describe a Desktop Review's purpose, and its value.
- Discuss the activities involved in a Desktop Review.
- Review case studies of Desktop Reviews.
- Examine how estimating and monetizing these claims is performed.
- Show what the final output of a Desktop Review looks like.


WEBINAR
Pete Fowler
CONSTRUCTION
Consultants
THURSDAY, DECEMBER 18TH, 2025 @ 10:00AM PT
Desktop Reviews
for Building Claims
With David Luxa and Pete Fowler

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ABOUT US

Building Experts.

Helping Smart People
Make Smart Decisions



Construction Defects



Property Claims



Personal Injury Claims



Contract Claims



Estimating, Quality & Construction Management

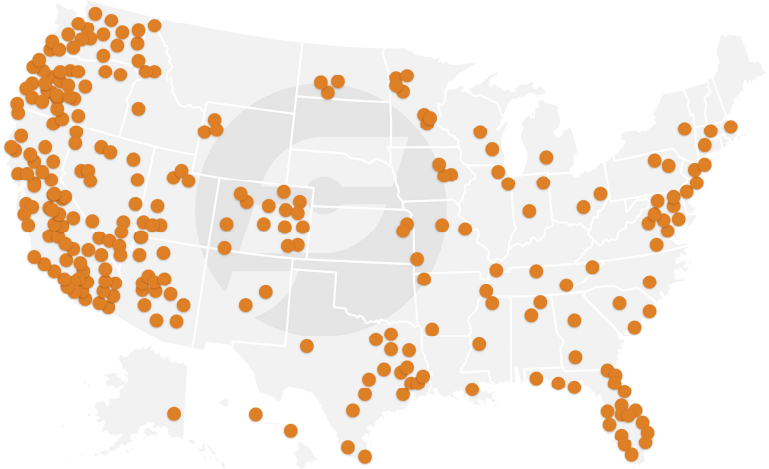


Fire Claims

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Project Map

Pete Fowler CONSTRUCTION Consultants



Our Clients

1. Lawyers
2. Insurers
3. Builders, Developers & Construction Contractors
4. Product Manufacturers & Suppliers
5. Government
6. Financial Institutions Including Lenders
7. Property Owners & Managers

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Meet our Presenters



Pete Fowler

Chief Quality Officer

Pete Fowler Construction Consultants

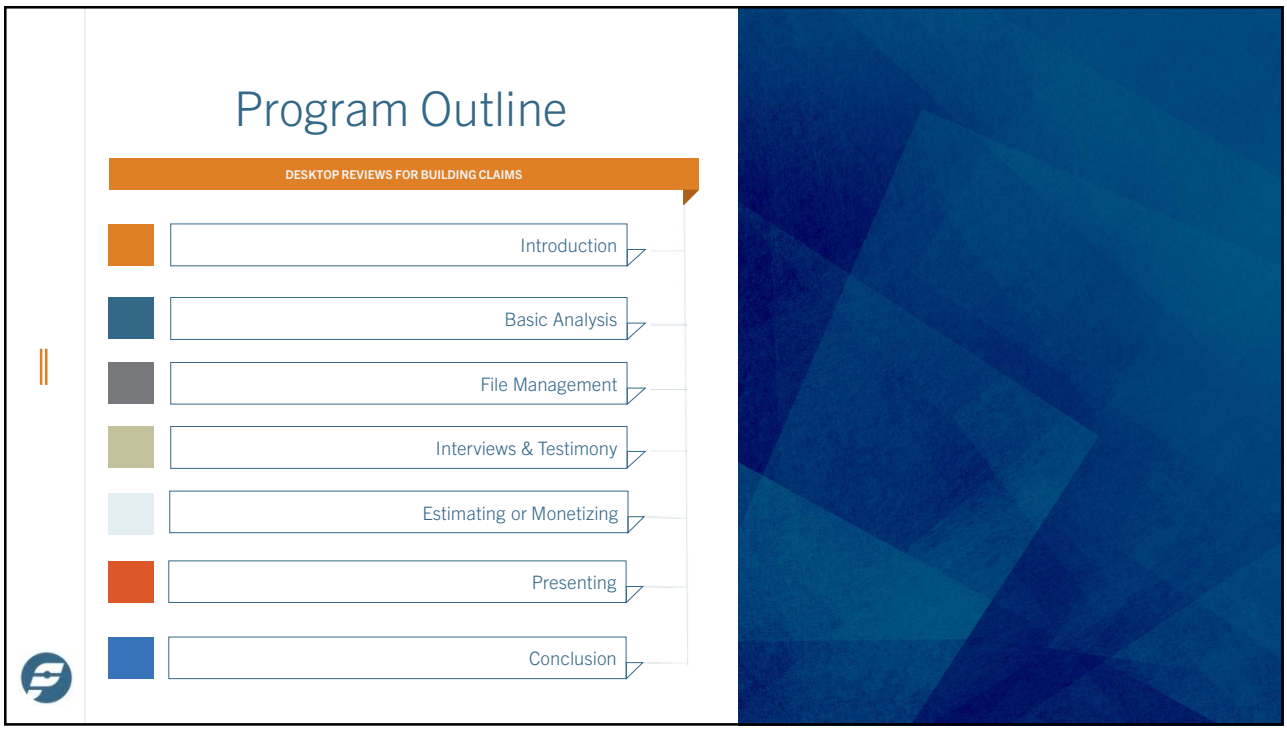


David Luxa

Expert

Pete Fowler Construction Consultants

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Program Outline
DESKTOP REVIEWS FOR BUILDING CLAIMS
Introduction
Basic Analysis
File Management
Interviews & Testimony
Estimating or Monetizing
Presenting
Conclusion

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Learning Objectives

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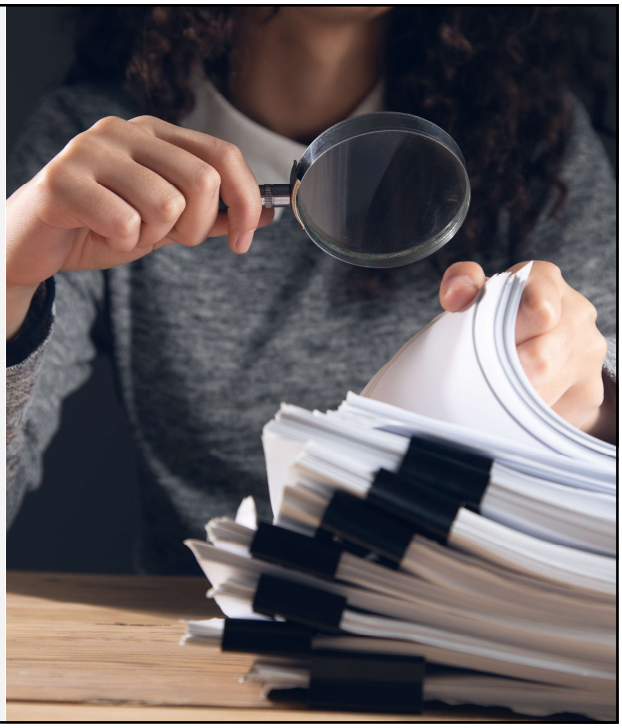
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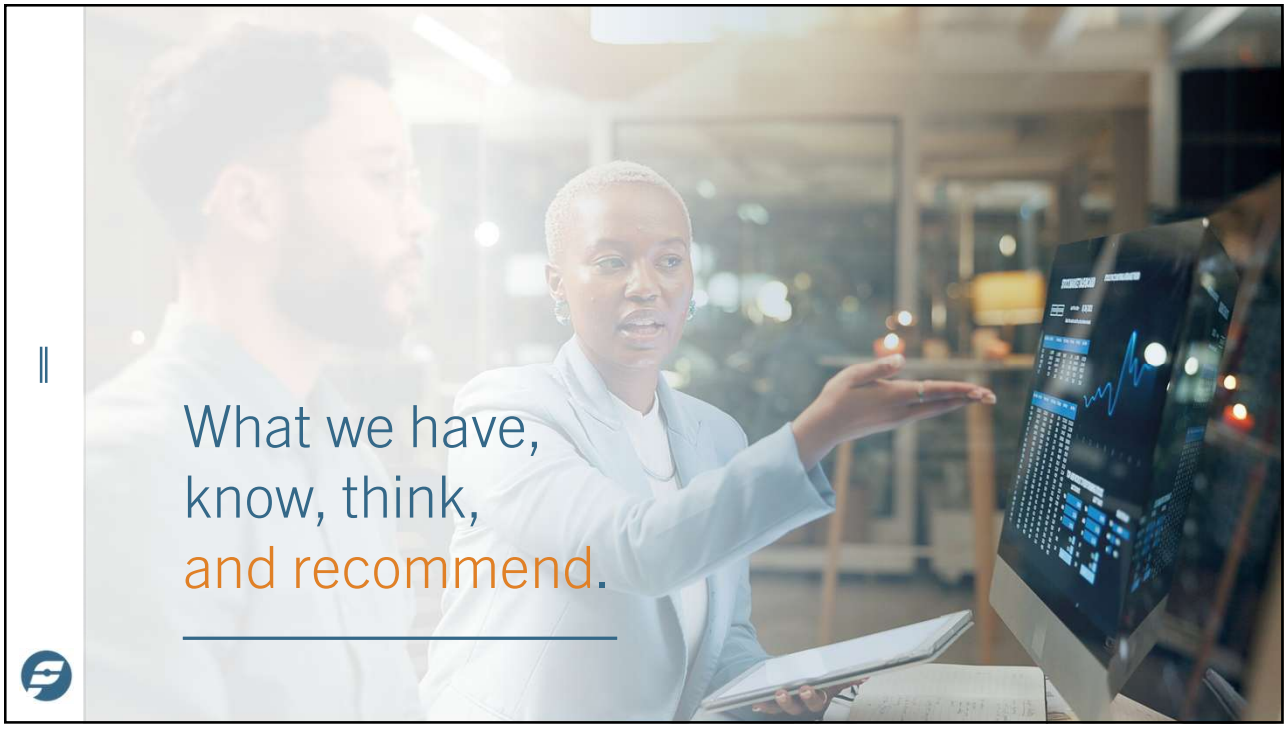
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Basic Analysis

- Images, Maps, & Plans
- One Minute Summary
- Technical Summary
- Plan Summary
- Kanban & Actions
- Timeline
- Players
- Issues
- Key Files
- Inspection Summary



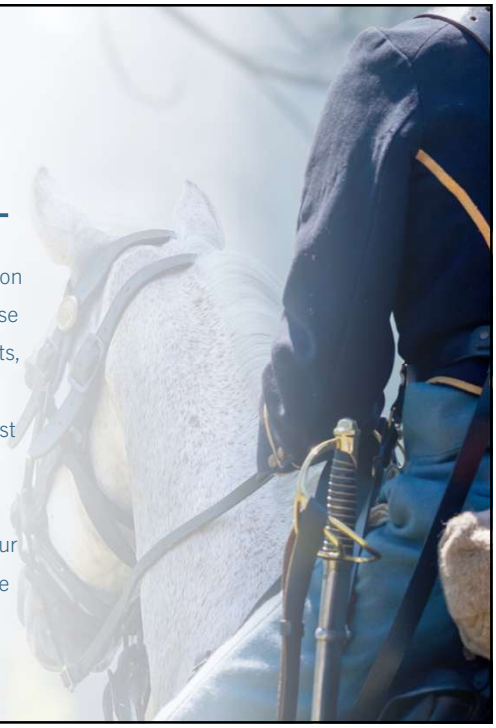
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Case Study:
The Civil War in 100 Words

The American Civil War (1861-1865) was a conflict between the Union (the North) and the Confederacy (the South). The war's primary cause was a deep and fundamental disagreement over slavery, states' rights, and westward expansion. The election of Abraham Lincoln in 1860, who opposed slavery's expansion into new territories, was the catalyst for eleven Southern states seceding to form the Confederacy. The conflict began with the Confederate attack on Fort Sumter. Battles raged from Virginia to Mississippi, devastating communities. After four years of brutal warfare, the Union ultimately prevailed, preserving the nation and leading to slavery's complete and permanent abolition.

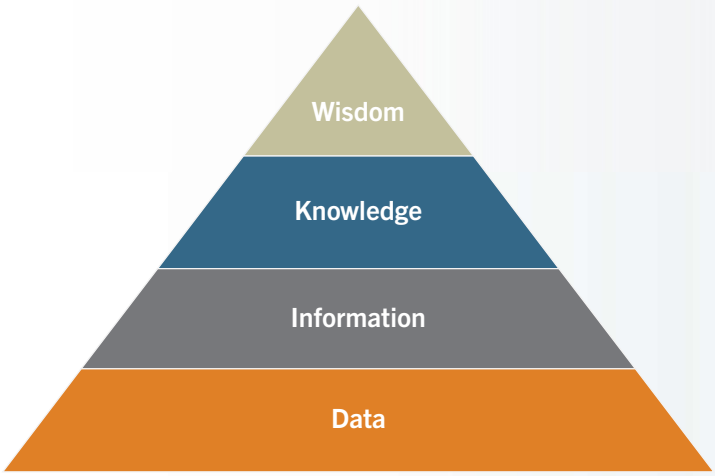


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DIKW: Data > Information > Knowledge > Wisdom



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Pile > File > Knowledge > Solution



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Collect, Organize, Index, Summarize,
Understand (Analyze), Reference,
Retrieve and Share

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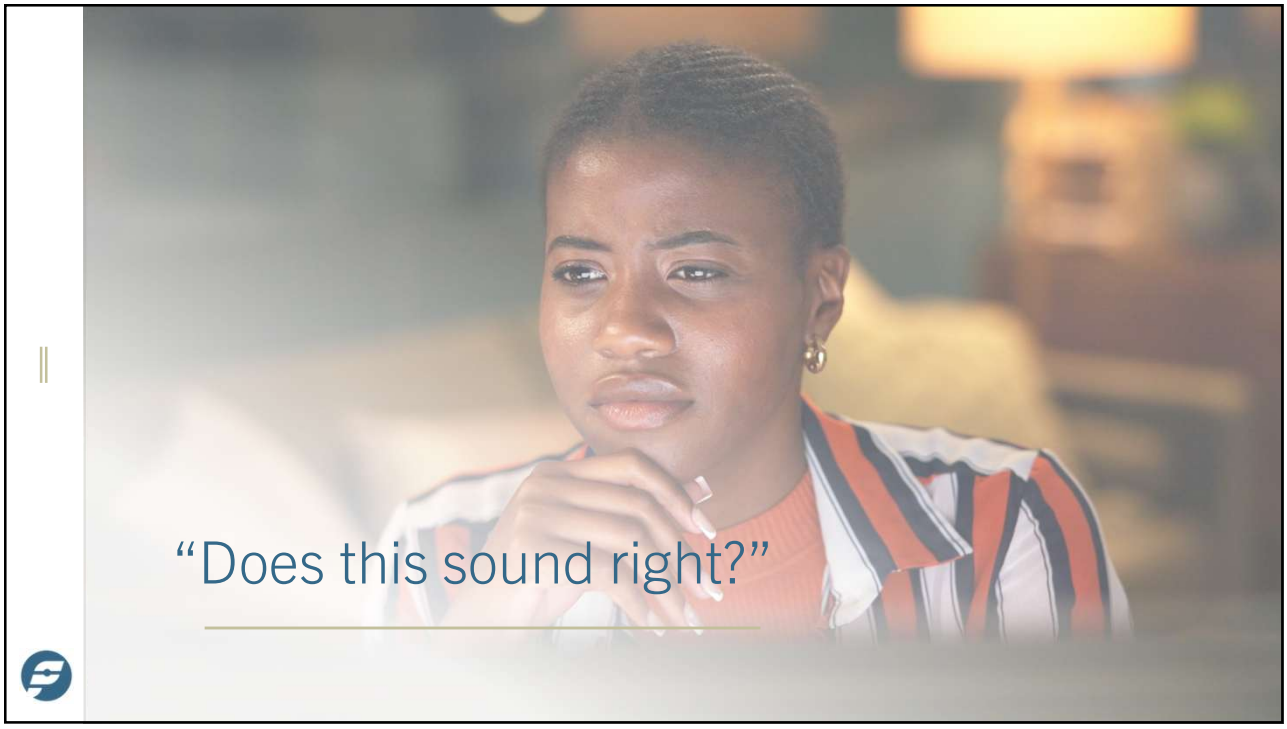
Case Study: 20,000 Documents and Trial on Tuesday



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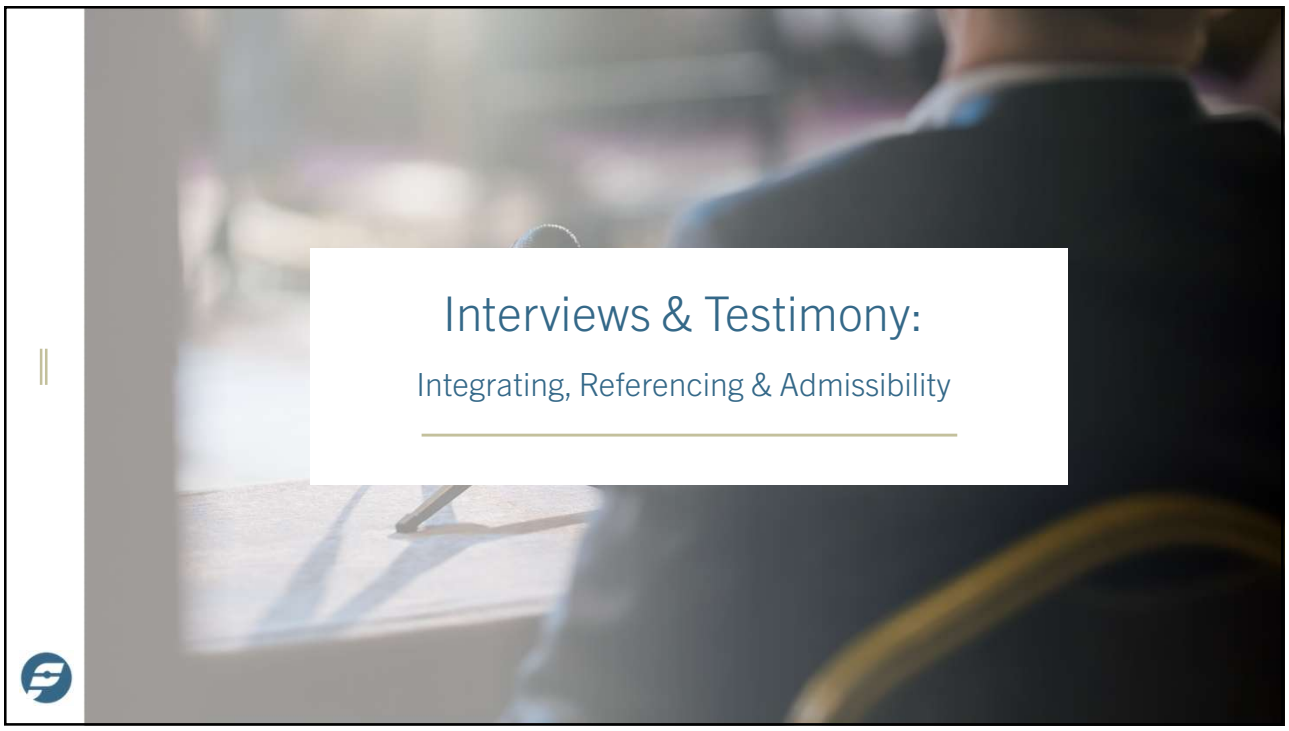
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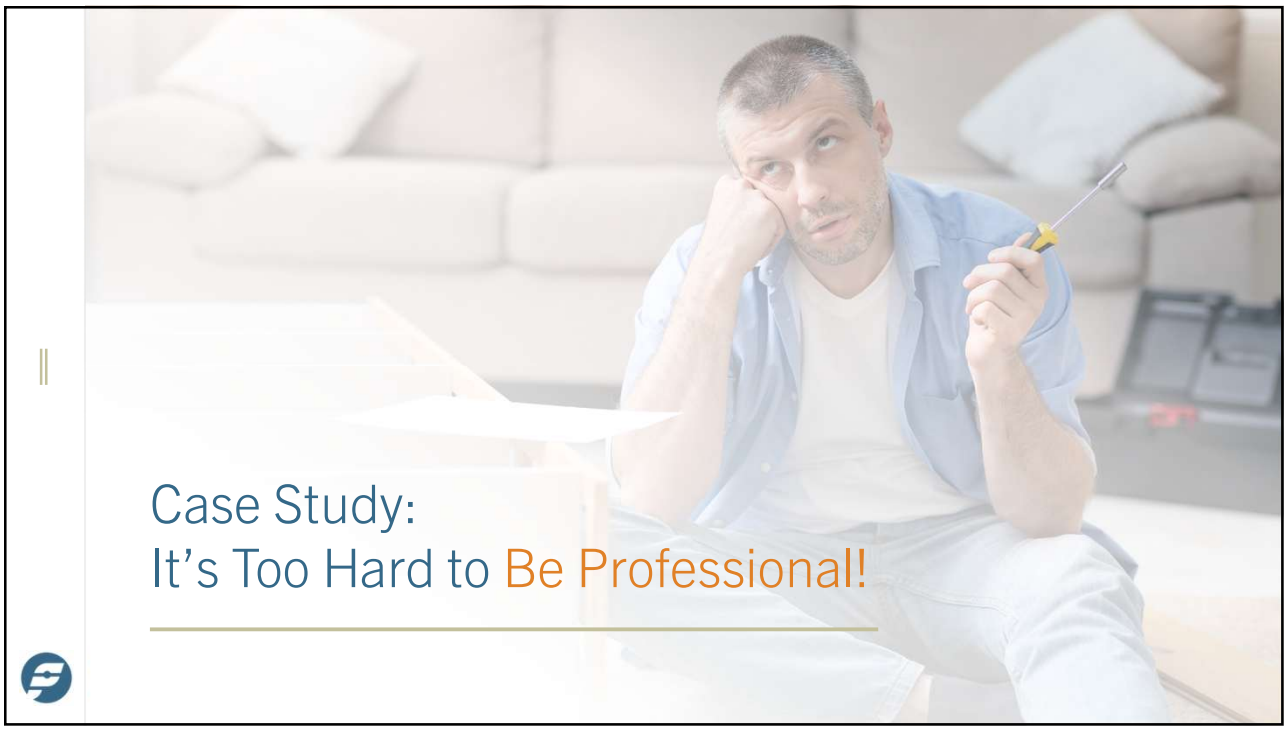
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Interviews & Testimony:
Integrating, Referencing & Admissibility

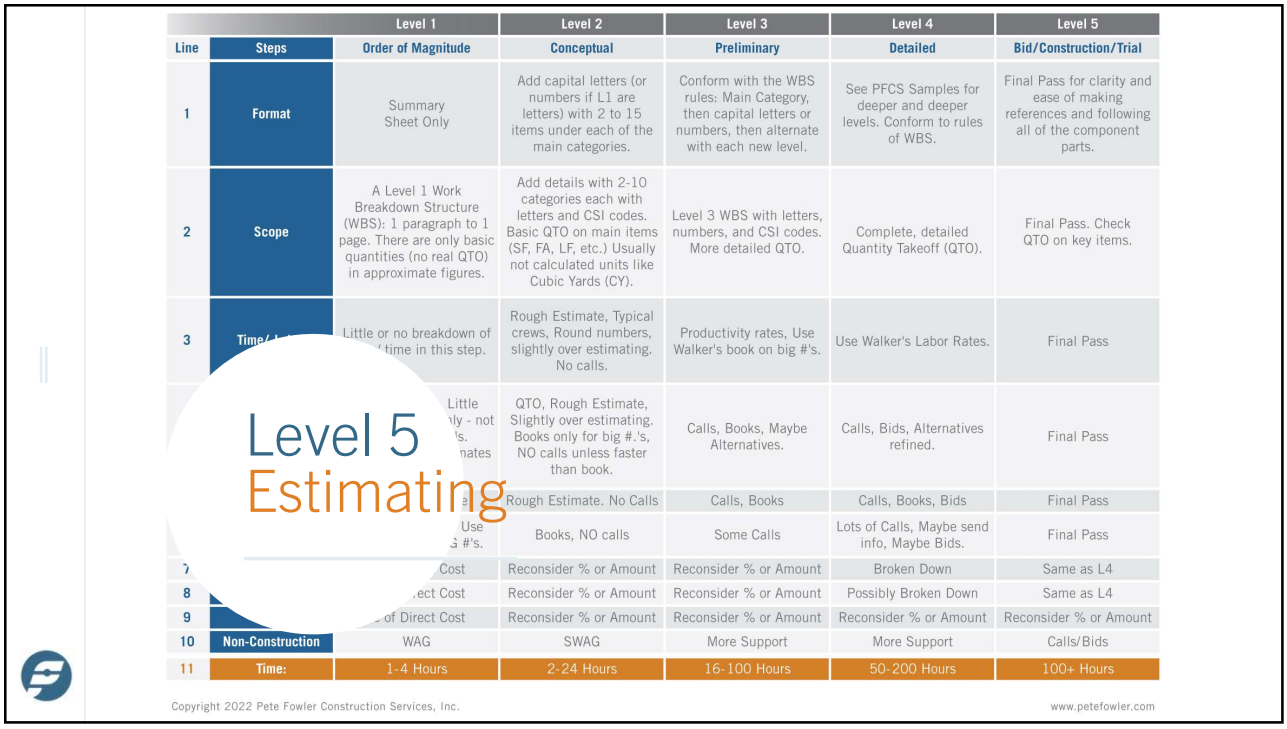
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Line	Steps	Level 1 Order of Magnitude	Level 2 Conceptual	Level 3 Preliminary	Level 4 Detailed	Level 5 Bid/Construction/Trial
1	Format	Summary Sheet Only	Add capital letters (or numbers if L1 are letters) with 2 to 15 items under each of the main categories.	Conform with the WBS rules: Main Category, then capital letters or numbers, then alternate with each new level.	See PFCS Samples for deeper and deeper levels. Conform to rules of WBS.	Final Pass for clarity and ease of making references and following all of the component parts.
2	Scope	A Level 1 Work Breakdown Structure (WBS): 1 paragraph to 1 page. There are only basic quantities (no real QTO) in approximate figures.	Add details with 2-10 categories each with letters and CSI codes. Basic QTO on main items (SF, FA, LF, etc.) Usually not calculated units like Cubic Yards (CY).	Level 3 WBS with letters, numbers, and CSI codes. More detailed QTO.	Complete, detailed Quantity Takeoff (QTO).	Final Pass. Check QTO on key items.
3	Time/	Little or no breakdown of time in this step.	Rough Estimate, Typical crews, Round numbers, slightly over estimating. No calls.	Productivity rates, Use Walker's book on big #'s.	Use Walker's Labor Rates.	Final Pass
		Little ly - not 's. nates	QTO, Rough Estimate, Slightly over estimating. Books only for big #.'s, NO calls unless faster than book.	Calls, Books, Maybe Alternatives.	Calls, Bids, Alternatives refined.	Final Pass
		a	Rough Estimate. No Calls	Calls, Books	Calls, Books, Bids	Final Pass
		Use 3 #'s.	Books, NO calls	Some Calls	Lots of Calls, Maybe send info, Maybe Bids.	Final Pass
7		Cost	Reconsider % or Amount	Reconsider % or Amount	Broken Down	Same as L4
8		ect Cost	Reconsider % or Amount	Reconsider % or Amount	Possibly Broken Down	Same as L4
9		of Direct Cost	Reconsider % or Amount	Reconsider % or Amount	Reconsider % or Amount	Reconsider % or Amount
10	Non-Construction	WAG	SWAG	More Support	More Support	Calls/Bids
11	Time:	1-4 Hours	2-24 Hours	16-100 Hours	50-200 Hours	100+ Hours

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Managing Expert Costs



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Estimate Analysis & Comparison



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Explain it to Pete's Mom

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A Diagram is Worth 1,000 Pictures



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A Diagram is Worth 1,000 Pictures

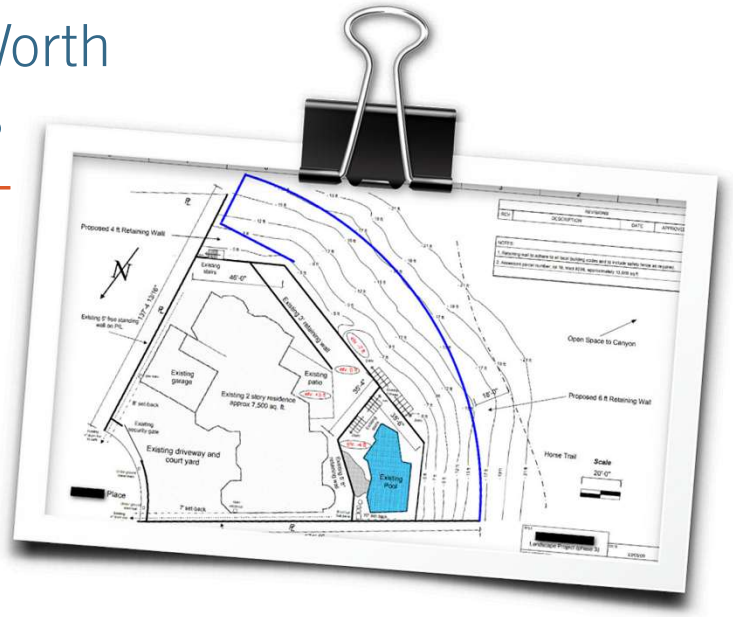


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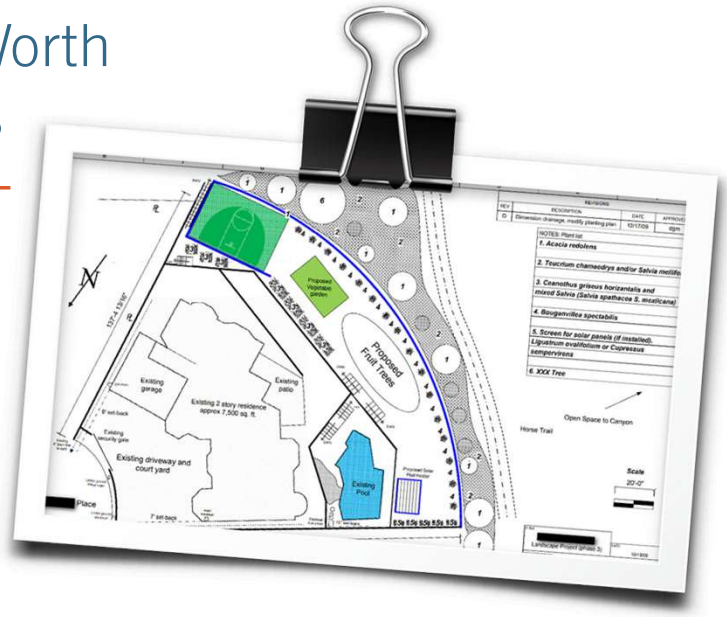


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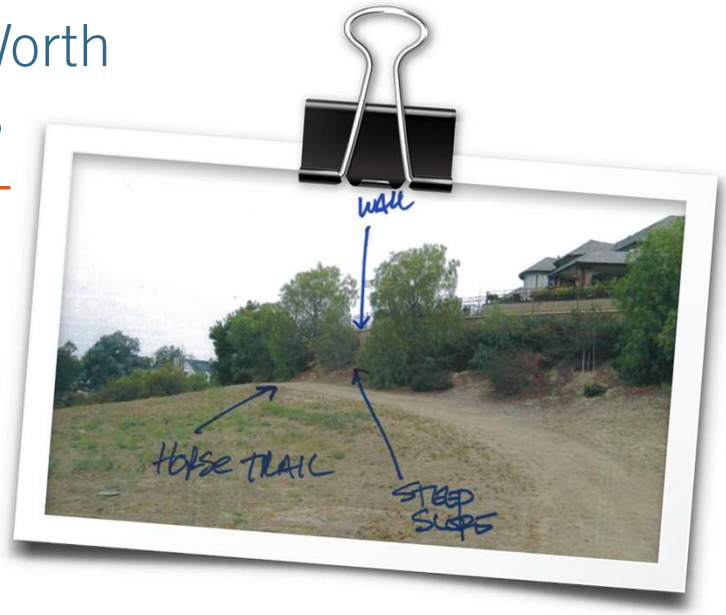
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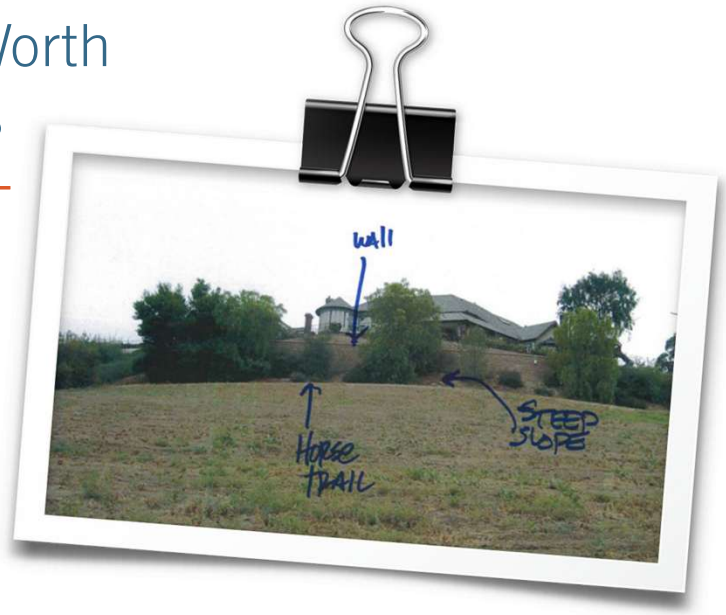


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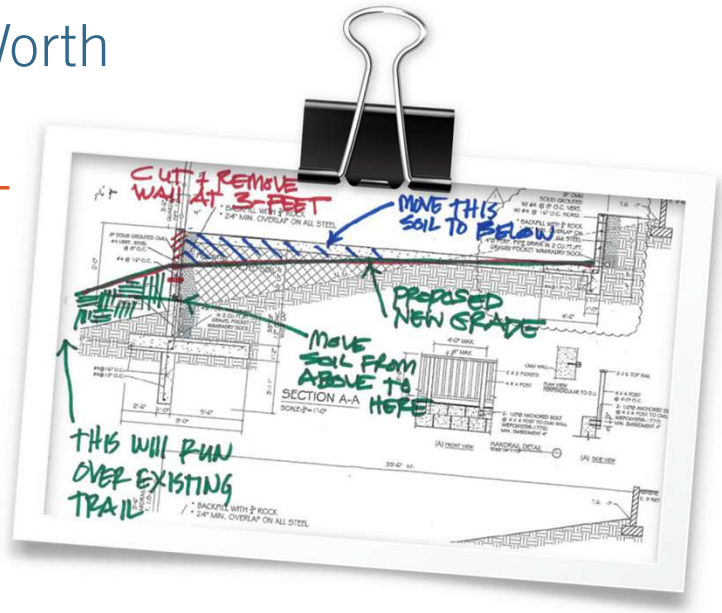
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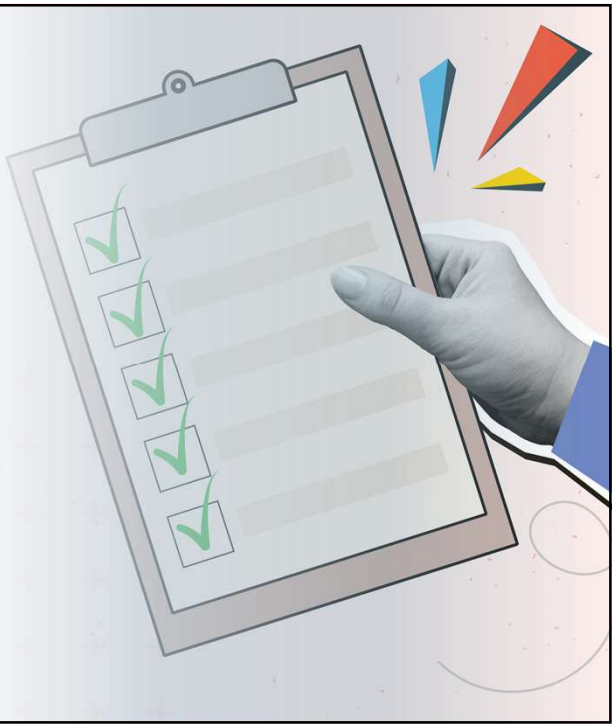


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A Diagram is Worth 1,000 Pictures



- Levels of Certainty
- Levels of Presenting
  - Telephone
  - Web
  - In Person
  - Formal
  - Testimony
- Levels of Reporting
  - Verbal / Informal
  - Meeting Agenda
  - Memo
  - Short Report
  - Long, Detailed Report



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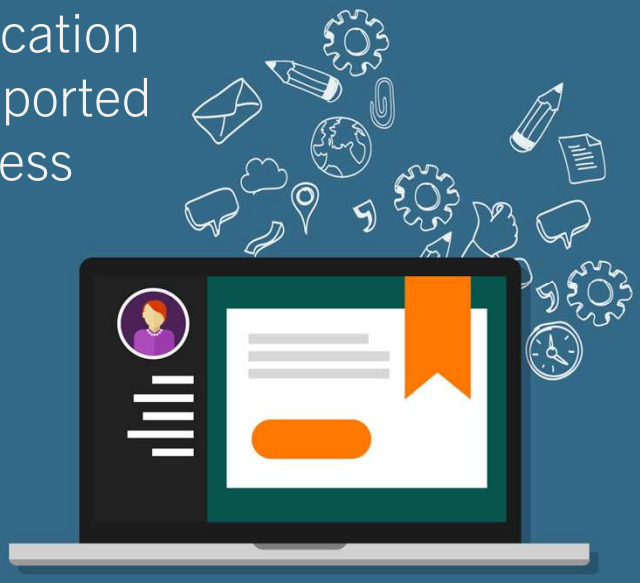
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Continuing Education Credit will be reported within 10 business days.



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We Want Your Feedback



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