



Date: 09/25/2025
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

Parker Anderson

EXPERT - PETE FOWLER CONSTRUCTION

Parker Anderson is an accomplished General Building Contractor with a Class B license serving as an Expert with Pete Fowler Construction. Parker provides evaluation and testing on physical building performance, examines enormous volumes of project documentation, and renders professional opinions based on his findings that aid in moving projects to their conclusion. In this process, Mr. Anderson frequently estimates project costs and tenders projects for bid. With extensive experience in residential and commercial properties, Parker has worked closely with many large insurance companies and property management accounts.

Parker has over 10 years of dedicated industry experience, and is constantly adding to his areas his expertise through professional development and training. He has completed both the 10-hour OSHA Construction Safety and Health certification as well as the OSHA 30 Hour Outreach Training for the Construction Industry, and is also certified as a Water Damage Restoration Technician (IICRC). Additionally, he has lent his knowledge to numerous projects and extensive reports, and he continually finds thoughtful ways to increase productivity, support team members, and improve project efficiency.



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.

Mark Phillips

PARTNER - RESNICK & LOUIS, PC

Mark C. Phillips is a Partner in the Irvine office of Resnick & Louis, P.C. and has extensive experience in all levels of analysis and litigation involving first- and third-party insurance coverage (including personal and commercial lines), extra-contractual liability, SIU/EUOs, construction defect, catastrophic personal injury, professional liability, premises liability, product liability, trucking, employment, and business litigation matters, including trials, appeals, mediations, and arbitrations. Additionally, he has drafted a variety of transactional documents and provided advice for corporate clients.

Presentation & Backup Materials

1. Lesson Plan with links to referenced Backup Materials
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

FLORIDA

(407) 517-0650

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

TEXAS

(469) 677-8710



Pete Fowler
CONSTRUCTION
Services, Inc.

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
2. [Managing Expert Costs](#) by Pete Fowler
3. [Understanding & Evaluating Construction Costs for Claims](#) by Pete Fowler
4. [Level 5 Estimating](#)
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

THURSDAY, DECEMBER 18TH, 2025 @ 10:00AM PT

Pete Fowler
CONSTRUCTION
Consultants

Desktop Reviews for Building Claims

With Parker Anderson, David Luxa, & Mark Phillips



ABOUT US

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Building Experts.

Helping Smart People Make Smart Decisions





Construction Defects



Property Claims



Personal Injury Claims



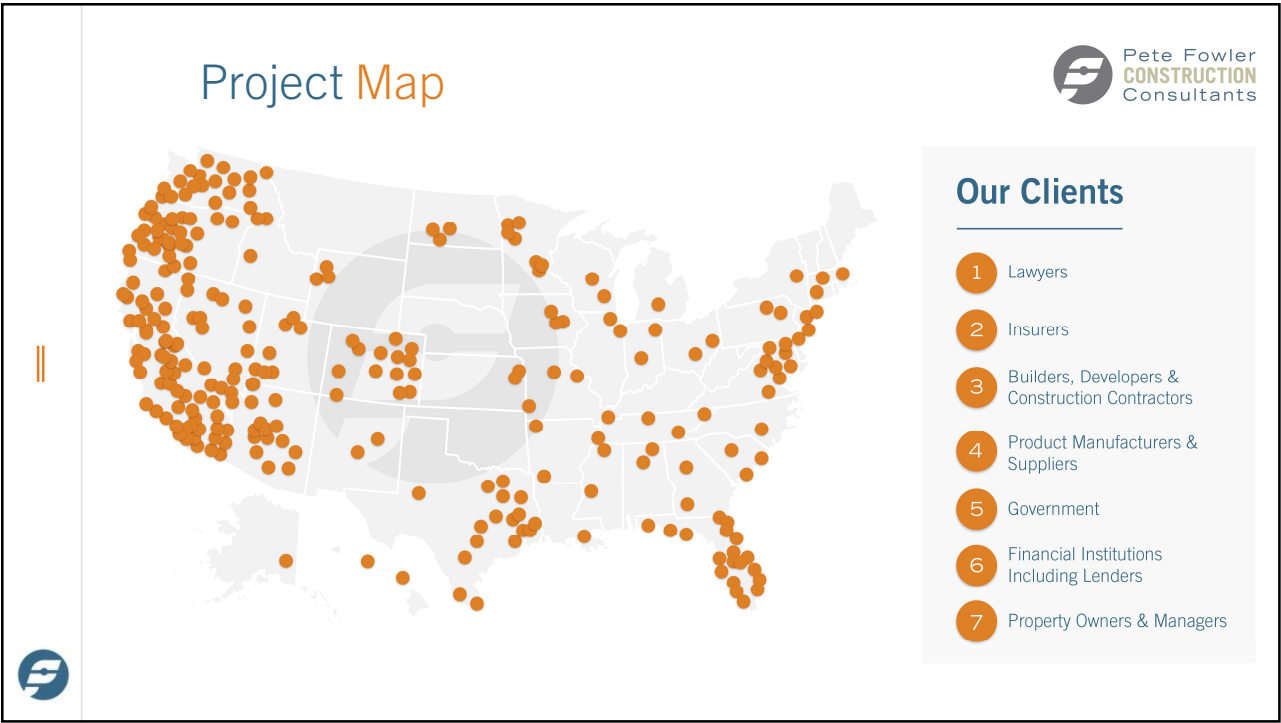
Contract Claims



Estimating, Quality & Construction Management



Fire Claims





Meet our Presenters



Parker Anderson

Expert
Pete Fowler Construction Consultants



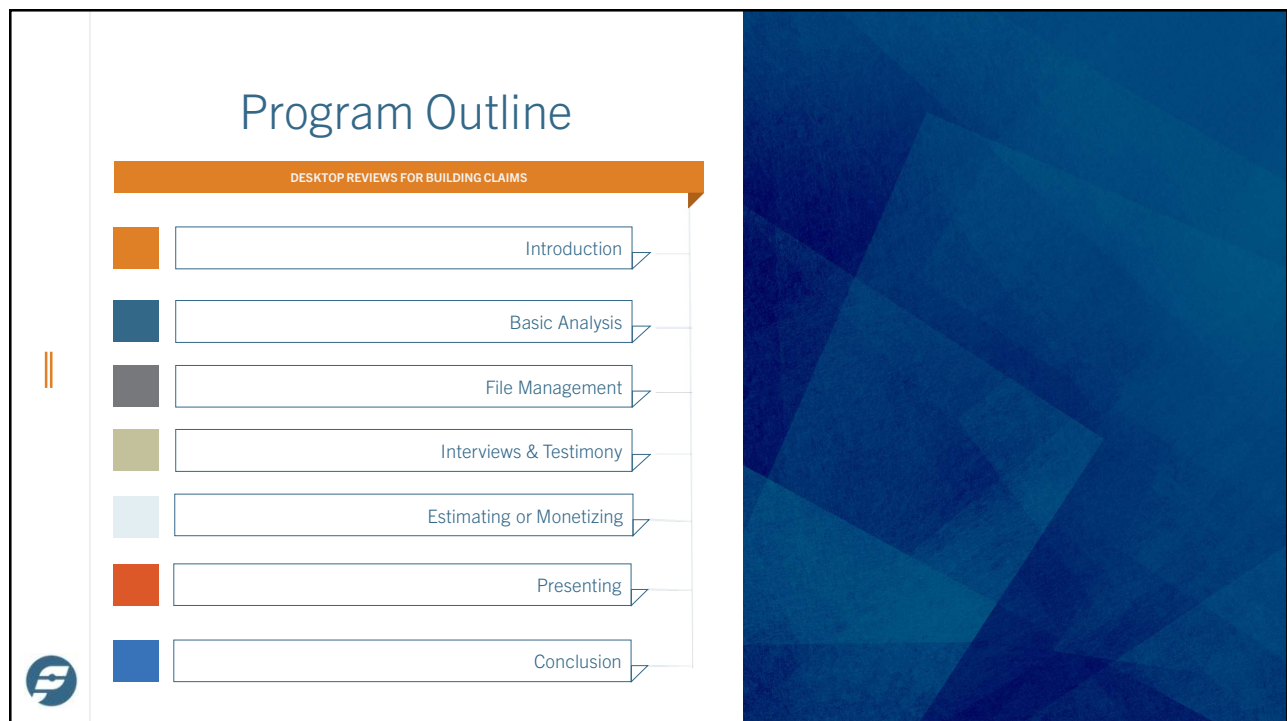
David Luxa

Expert
Pete Fowler Construction Consultants

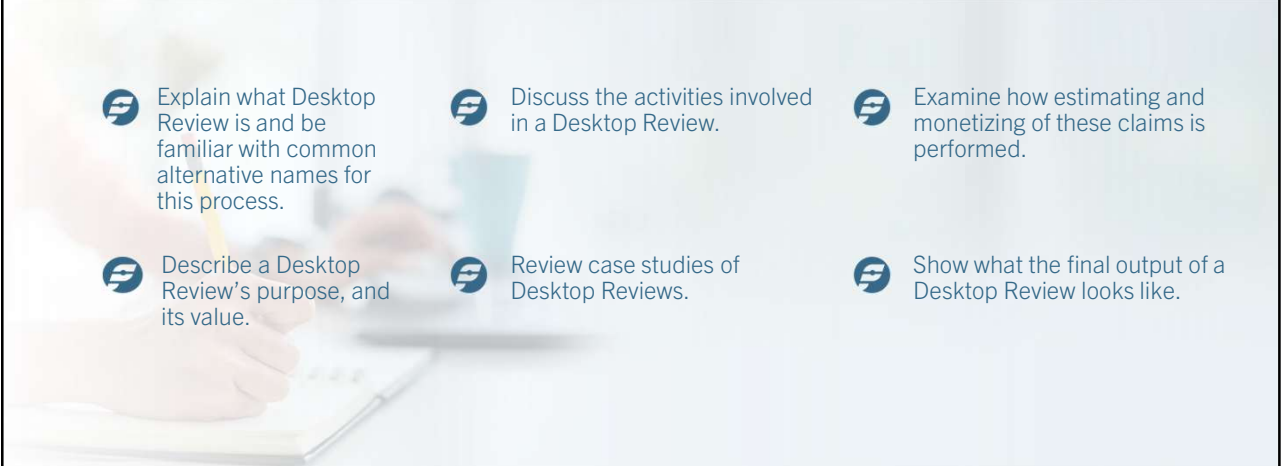


Mark Phillips

Partner
Resnick & Louis P.C.



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Introduction





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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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What we have,
know, think,
and recommend.



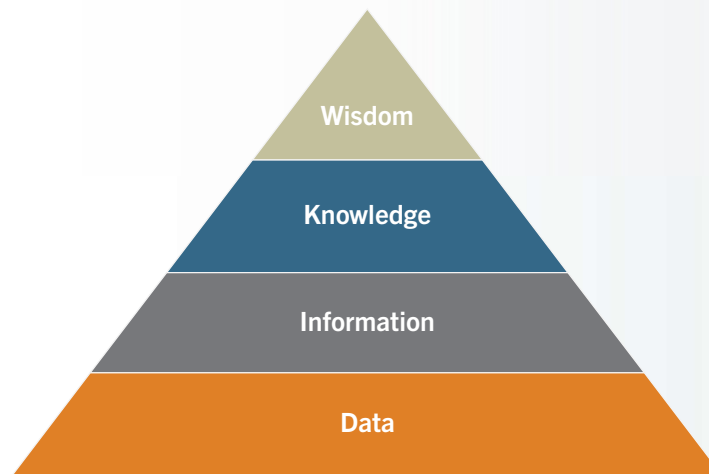
Case Study: The Civil War in 100 Words

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.





DIKW: Data > Information > Knowledge > Wisdom



Pile > File > Knowledge > Solution



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

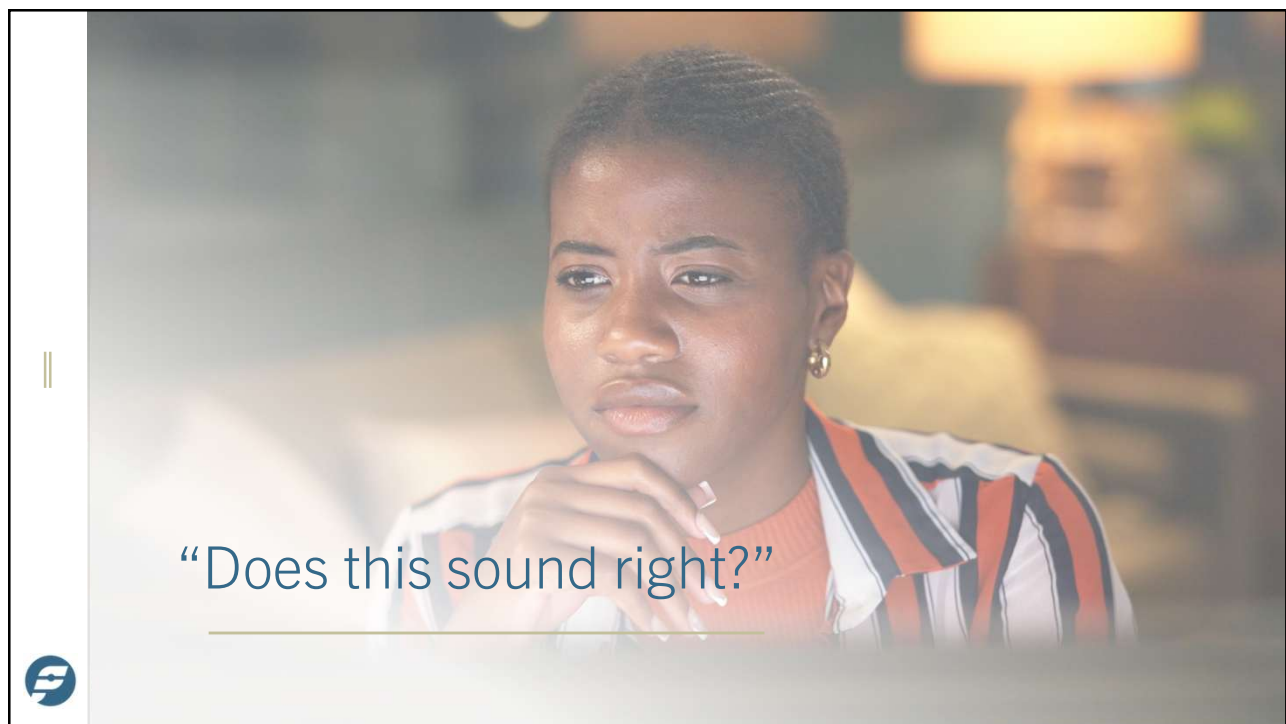
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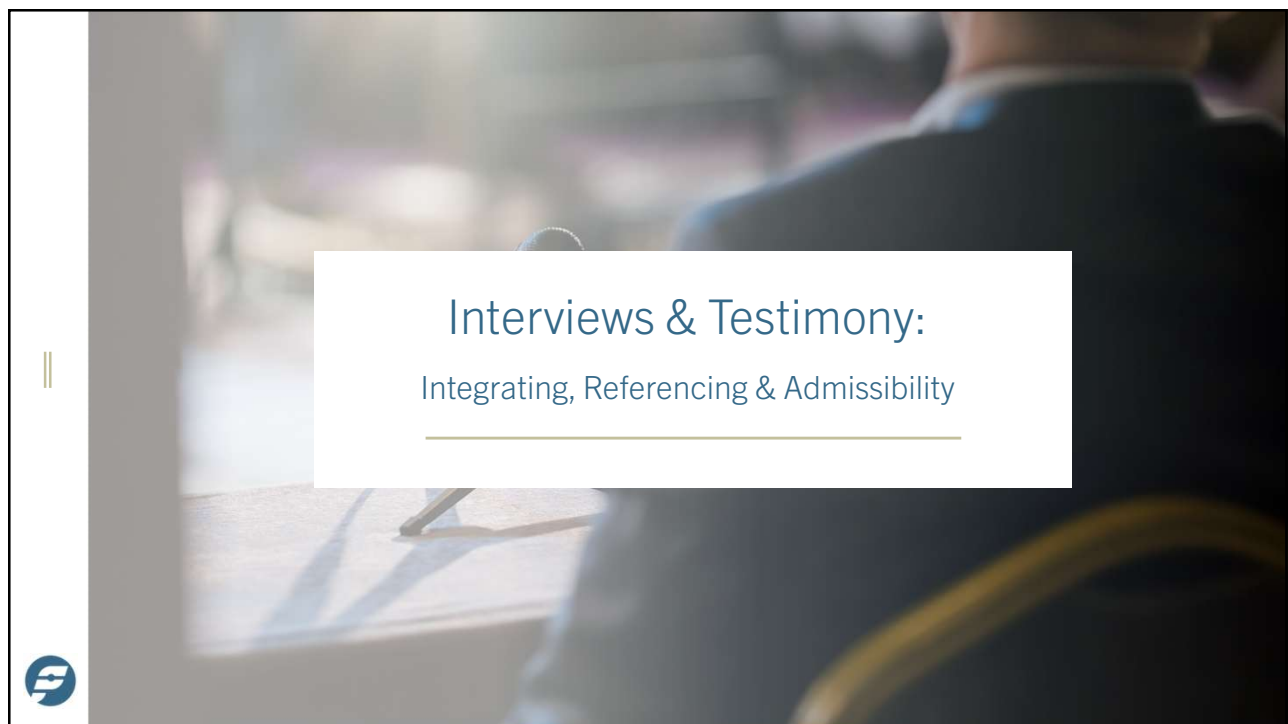
Case Study:
20,000 Documents
and Trial on Tuesday











II

Interviews & Testimony:

Integrating, Referencing & Admissibility





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Case Study:
It's Too Hard to Be Professional!





Line	Steps	Level 1	Level 2	Level 3	Level 4	Level 5
		Order of Magnitude	Conceptual	Preliminary	Detailed	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/Labor	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
4	Materials	Little or no breakdown of materials in this step.	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
5	Subcontractors	Rough Estimate. No Calls	Books, NO calls	Calls, Books	Calls, Books, Bids	Final Pass
6	Indirect Costs	Use % of Direct Cost	Books, NO calls	Some Calls	Lots of Calls, Maybe send info, Maybe Bids.	Final Pass
7	Construction Cost	Reconsider % or Amount	Reconsider % or Amount	Reconsider % or Amount	Broken Down	Same as L4
8	Non-Construction Cost	Reconsider % or Amount	Reconsider % or Amount	Reconsider % or Amount	Possibly Broken Down	Same as L4
9	Summary of Direct Cost	Reconsider % or Amount	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

Level 5
Estimating



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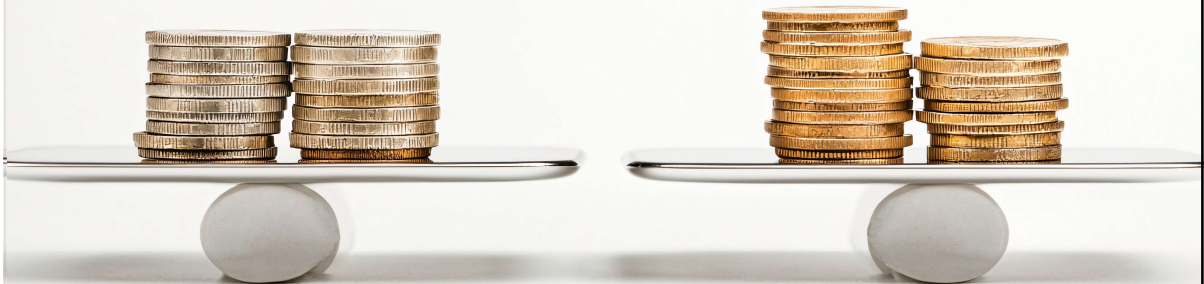
Managing Expert Costs



Costs Should Always Be an Issue



Estimate Analysis & Comparison







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Explain it to
Pete's Mom

A Diagram is Worth
1,000 Pictures



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- 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

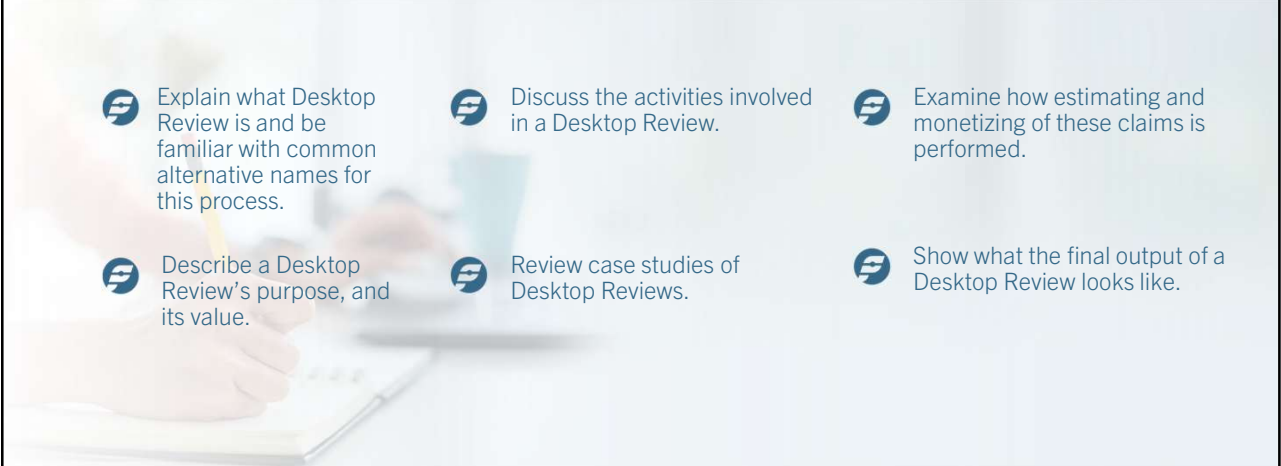




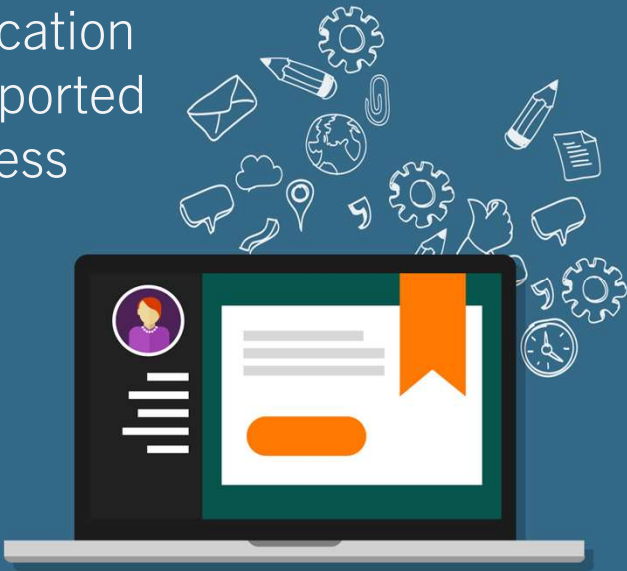




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Continuing Education
Credit will be reported
within 10 business
days.



The illustration features a laptop with a dark screen. On the left side of the screen is a circular profile picture of a person with red hair. To the right of the profile picture is a document icon with a green border, an orange bookmark, and an orange button at the bottom. Surrounding the laptop are various white line-art icons on a dark blue background, including gears, a pencil, a paperclip, a globe, a location pin, a speech bubble, a clock, and a hand cursor.

