“All plans examiners shall conduct themselves in a professional, courteous, impartial, responsive, and cooperative manner.”

[OBC and RCO Section 104.2.2]

The Goal of this presentation:
Plans Examiner Characteristics

Professional registration is required for the master plans examiner certification, but not for any other plan examination certifications

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Plan Examiner Characteristics

- Knowledgeable in the legal and technical aspects relating to building codes, building materials, and building construction techniques
- Able to read and understand building plans
- Willing to continually learn
- Of a research-oriented mindset
- A good communicator (written and oral)
- Decisive (to the degree that the codes limit and allow)
- Flexible
- Honest
- Consistent

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The Ideal Plans Examiner is:

- Current code books and referenced standards
- Code and standard “Commentary” books and “Handbooks”
- Plan Review Checklists
- Plan Review Records
- Computer and software
- Internet Access (to review research reports, listings, manufacturer’s installation instructions, standards, BBS website, etc.)
- Highlighters (old school)

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Tools of the Plans Examiner
Top Ten key points for Plans Examiners to understand and remember

1. Understand the difference between a code and a standard
   - A code generally prescribes "when and where" something is required
   - A standard generally prescribes "how to" or in what manner to accomplish the code requirement
   - A standard sets the specific conditions or requirements to be met and specifies a method of testing to determine prescribed characteristics of materials and products
   - A standard is not intended to be used as a primary law but as a secondary authoritative reference
   - A standard is to be used only to the extent that it is referenced in the code
   - A standard is not applicable unless referenced from the code
   - The specific editions of the standards referenced in the code are listed in OBC Chapter 35, OMC Chapter 15, OPC Chapter 15, and RCO Chapter 44

The hierarchy of laws, codes and standards

- Ohio Revised Code (ORC) - State law adopted by the Ohio General Assembly
- Ohio Administrative Code (OAC) - Administrative rules adopted by State Agencies/Boards such as the BBS
- Referenced standards - referenced in the ORC or the OAC
2. Always look up code sections

- The model codes change every three years
- The BBS makes complete updates to the Ohio codes based upon these model codes approximately every five years
- Sometimes changes are made in between code cycles. We call these interim updates “Amendment Groups”
- It is very difficult for even the best and brightest minds to keep up-to-date on the many changes
- It’s always best to research code sections and verify on the BBS website that you have the latest code updates to ensure that what you remember is still in effect and accurate
- Your credibility is at stake! Please don’t rely on your memory!

3. Seek out continuing education

- Based upon our education and past experiences, we each have areas of expertise that we may prefer to focus on
- As code professionals, we need to be generalists, knowledgeable about a broad range of subjects
- We need to force ourselves to learn outside of our comfort zone
- Seek out and attend classes to help fill in where your expertise may be lacking

4. Try to be as thorough, efficient and decisive as possible

- Construction projects are almost always under very tight deadlines
- Designers and contractors are under great stress to meet these deadlines
- Recognize that most everyone is doing the best that they can to get the job done correctly and within the established deadlines
- Please respect the established plan review deadlines and work as efficiently as possible
- Respond to inquiries in a timely fashion in order to help the project managers keep these projects moving through the design and regulatory processes as quickly as is reasonably possible
5. Be consistent
- Treat all applicants equally
- Enforce all provisions the same way on all jobs
  - Regardless of who submitted the work
  - Regardless of the experiences that you may have had in the past with the owner or designer
  - Regardless of the quality of the submittal
- Use checklists

6. Be flexible and open-minded
- Code language is written by people just like you and I
  - The grammar is rarely perfect
  - The language is rarely absolutely black and white
  - There are probably more shades of grey than black and white
  - We can find many examples where there are multiple ways of reading/interpreting the same code section
- Assuming the most restrictive interpretation is not consistent with the law
- Remember to defer all controversial interpretations to the building official

"The rules of the Board and proceedings shall be liberally construed in order to promote its purpose."
(SBC Section 101.3 and RCO Section 101.4)

7. Ask questions…open the lines of communication
- Most challenges can be solved quite easily when you enlist the help of others
- If you are unclear, don’t be embarrassed to ask for clarification
- Communicate with your building official, other plans examiners, inspectors, product representatives, and other design professionals
- We all have different professional backgrounds and experiences
- We can all learn from one another
- We are all students of life…we are all still learning
8. Treat every moment as a teaching moment

- Not only are we all students, but we are all teachers
- Everyday we stumble upon and humbly find code sections that we didn’t realize were always there
- Try to be a gentle and patient teacher
- Achieving cooperation and obtaining code compliance is much easier when you kindly and graciously educate your customers about the intent of the code requirements, rather than arrogantly and forcefully demanding compliance without explanation or justification
- Remember that you get what you give!

9. Always treat the public and your co-workers with respect

- We all have personal and public challenges that we face daily
- Please learn healthy ways of dealing with stress so that your personal issues don’t affect your work and the way you treat others
  - When you feel upset, you should exercise self control
  - If necessary and possible, remove yourself from the situation until you can respond rather than react
- Recognize that we all have differing opinions, beliefs, and values...even when it comes to code issues
- Regardless of your differences, your customers and co-workers should always be treated with utmost respect
- In the professional workplace, the only option is to treat everyone in a professional manner, free of judgment

10. Keep things in perspective

- Keep in mind that there is no such thing as a “perfect plan”
  - You could spend years going back and forth with a designer trying to get every code section detailed on a set of construction documents
  - That would not be reasonable, practical, or acceptable
  - At some point, you need to let go so that the project can move forward
- Shift your way of thinking and acting
  - Pick your battles...Target your review on critical issues
  - Look for ways to approve the project rather than looking for ways to turn down the project
10. Keep things in perspective (continued)

- Remember the reasons for conducting a plan review
- To reasonably ascertain compliance with the code
- To promote development within your community

Focus on “Construction”, rather than “Obstruction”!

If you have questions after this presentation, feel free to contact me:

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See you for Part 2!