

Plan Review Task Force

Collaborative Review

04/12/2010

1. Background

Mecklenburg County's commercial plan review process is built on the A&E five phase process (schematic, design development-DD, construction documents-CD, bidding, construction administration-CA), where projects conclude one phase before starting another. So we perform preliminary reviews on projects somewhere in the schematic/DD phase, and final reviews on projects which have nearly completed construction drawings. This model is decades old, perhaps half a century. In today's fast paced business climate, projects are wandering far from this model, and it creates both problems and challenges for us.

Recently, the Department conducted a test program of a different approach to plan review service delivery. The theory driving the idea is that some Architects use a project design development process that is so different from the traditional five phase model that it doesn't fit well into our plan review process. There is a very fluid design development and construction document process, driven by their electronic drawing capacity and a schedule pace that is so aggressive, that CD's are sometimes produced while design concepts are still in development. The impact on us is that the code logic can change significantly. Logic that we discussed in a preliminary review meeting may (and often does) significantly change by the time the final project is submitted for permit application. In some cases, design details impacting code logic are still being worked out even while the review of CD's is under way.

It's easy to see how such a fluid design development process has trouble moving through our plan review process, even with a very user-friendly tool such as OnSchedule. We don't think this peculiar AE service delivery is an aberration, but rather a reflection of project schedule pressure, driven no doubt by the time value of money. Consequently, we believe a service tool experiment focusing on this problem is appropriate.

The Collaborative Review Program is described below. The scheduled start date is to be determined.

2. Collaborative Review Program

Collaborative Review would be restricted to Superior Performers (team score) and Successful Performers (team Score) within the A/E pass rate Incentive. This tool will provide the ability for the Plans Examiners and Architects/ Engineers to discuss code related issues during the design of the project, prior to formal plan review.

2.1 Type of Projects:

Projects eligible for Collaborative Review are ones utilizing OnSchedule, Express, or Mega.

2.2 Time of Review/Application/Scheduling:

The request for Collaborative Review should be made through the Electronic Plan Management (EPM) system. The customer will request an initial project design meeting, name the trades/plans examiners they wish to be present and attach an agenda to the request. The initial project design meeting will be held to discuss the level of participation desired by the customer by the plans examiner(s) through the design of the project, and any key points of code interpretation or analysis that may impact the design of the project.

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2.3 Logistics:

This program will rely heavily on electronic plan review and the availability of plans examiners to the design team. Each "collaboration" will be charged at the rate of \$145.00 per hour per trade. The customer will contact the plans examiner(s) by email as issues arise that they wish to discuss.

The level of formal plan review at the conclusion of the design of the project will be directly related to the level of "collaboration" performed during the design of the project. Ideally, when the project finally arrives in the formal permit application process, the code review is a pass-through confirming that everything discussed is in order, rather than the typical complete reconstruction, analysis and review of the code issues on the project.

2.4 Fees

The fee for this program will be \$145.00 per hour per trade utilized, similar to the Mega Review process. The Initial Project Design meeting will also be charged at \$145.00 per hour per trade. If the project is a Mega project utilizing Collaborative Review, the project will be charged per the Mega Review guidelines with no additional fees. All other applicable plan review fees, such as fees for outside agencies, will be accessed.

2.5 Grading

Projects that participate in Collaborative Review will be graded as part of the AE Pass Fail program. Mega projects will not be graded.

2.6 Start Date

Start date is to be determined

2.7 To Be Determined

Technology Needs

- When project is stubbed into the Posse Permitting Software program from EPM, have Posse allow notes to be added even though the project has not been gated.
- Make the project identifiable that it is Collaborative review in EPM and Posse for plans examiners
- Add initial project design meeting to EPM
- EPS/EPR should be in place prior to program start date

Key Points

- If the customer wishes to have an immediate review, an additional fee of \$500.00 will be charged
- For normal scheduling, the fee will be \$145.00 per hour per trade