

Preliminary Review/Advance App B Meeting

Plan Review Task Force

December 4, 2009

1. Introduction, issue and background

Beginning in January 2007 the Plan Review Task Force (PRTF) reconvened to review issues pertaining to the plan review services provided by Mecklenburg County Code Enforcement (MCCE). One specific goal set by the PRTF was **to investigate the feasibility and demand for a required Preliminary Review/Advance Appendix B meeting for poor performers**. The PRTF supports this program in concept:

The start date is tentatively scheduled for January 1, 2010.

2. Plan Review Task Force Preliminary Review/Advance Appendix B Program

Restricted to Poor Performers, this tool will provide assistance to customers in the poor performing category to improve their scores by requiring a preliminary review/advance appendix B meeting to be performed prior to scheduling their project for review.

2.1 Type of Projects:

- All OnSchedule projects that have a poor performing team member will be required to have a preliminary review/advance appendix B meeting.
- Only the poor performing team member(s) will attend the preliminary review/advance appendix B meeting. Other team members may attend at their discretion.

2.2 Application/Scheduling:

- Customers will submit the project through the Electronic Plans Management (EPM) system.
- Customers will be notified through the Electronic Plans Management (EPM) dashboard the project is in the poor performing category and subject to a preliminary review/advance appendix B meeting and a peer review for the poor performing team member(s).

2.3 Time of Preliminary Review/Advance Appendix B meeting:

- Poor performing team member(s) will attend the scheduled preliminary review/advance appendix B meeting prepared to discuss their code logic as defined on the agenda submitted to Mecklenburg County Code Enforcement.
- The completed peer review form must be submitted at the time of the preliminary review/advance appendix B meeting.
- The project will be scheduled for plan review at the conclusion of this meeting. The project manager will be notified of the scheduled plan review date through their EPM dashboard.

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2.4 Scores:

2.4.1 Posting of Scores

- a) Scores will be posted quarterly based on the most recent 14 events with MCCE

2.4.2 Score Adjustment

- a) To move off of the poor performing list, individuals may improved their score for the next quarter by successfully passing plan review events or;
- b) A/E's may study their way off the poor performer list by attending and successfully completing either:
 - a. An NC level III Code Officials Class in their discipline (successful completion means passing the class test)
 - b. Or other code classes of similar rigor, defined by the Department.
- c) Once the class is complete, the score will be changed to Successful for the remainder of that quarter
- d) The next quarterly posting will be based on the most recent 14 events with MCCE
- e) This option may be used one (1) time per year

2.5 Fees:

No fees will be charged for this service by MCCE.

2.6 Assumptions:

Refers to primary trades, B/E/M/P

2.7 The Preliminary Review/Advance Appendix B Meeting Program startup will be phased in.

The program will be established and await the qualification of poor performing customers. As poor performing customers are identified, the program will begin. Anticipated begin date is January 1, 2010.

2.8 Industry notification of Preliminary Review/Advance Appendix B Meeting Program startup.

- A. 45 to 60 days prior to program start up a targeted letter writing campaign will be affected to advise all project designers of the program startup.
 1. An intense public presentation and information campaign will be planned with the AIA, PENC and other trade associations.
 2. At least one public presentation will be held in brown bag lunches at the Hal Marshall Service Center