

Team Plan Review

Plan Review Task Force

April 12, 2010

1. Background

In the last year, customer meetings raised an issue regarding whether or not the current plan review/inspections service method works well in identifying all concerns that will arise later in the field. Customers recognize that plan reviewers focus on helping them work through problems; at the same time, they realize the inspector's deal with the full-scale model, and plan reviewers aren't going to catch everything. The general feeling from these discussions is that, on some projects or in some cases, it would be beneficial to have more interaction between the plan reviewer and inspector up front on projects, both before they gain their permit, and perhaps also in pre-construction meetings. There seems to be customer interest in this, even if it is structured as a premium service.

While the Rehab Code Team's start to finish service ended when we mainstreamed the program, many customers continue to identify the service delivery model of the Rehab Code Team as something that is desirable. At the same time, Department studies show this service type demands more time per project, consequently, applying a start-to-finish service delivery mode across the board would demand staggering increases in staff levels (perhaps as large as 25-30%).

The Team Plan Review Program is described below.

2. Team Plan Review Program

Team Plan Review would be restricted to only Superior Performers (team score) within the A/E pass rate Incentive Program for the 12-month pilot. This tool will provide the ability for the Plans Examiners, Architects, Engineers and Inspectors to discuss and be aware of issues that may arise during the construction of the project.

2.1 Type of Projects:

Projects eligible for Team Plan Review will be any project moving through the OnSchedule, Mega, NC Rehabilitation, or Express Review service stream.

2.2 Time of Review/Application/Scheduling:

At the time a customer submits their application through the Electronic Plan Management (EPM) system, they will note their intention to utilize Team Plan Review. The OnSchedule Coordinator will schedule a preliminary review meeting, notify the Inspection by Appointment (IBA) Coordinator of the meeting. The IBA Coordinator will schedule the appropriate trade inspectors for the meeting.

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At the preliminary review meeting, the AE's will present the major code issues concerning the project. They will take and distribute minutes for the meeting. The owner, or his/her agent, will decide which level of Team Plan Review they would prefer:

- o Level 1
 - Inspectors involved in preliminary review meeting only
- o Level 2
 - Inspectors involved in preliminary review and in 1st cycle of plan review
- o Level 3
 - Inspectors involved in preliminary review and all cycles of plan review until permit issuance

At the conclusion of the meeting, while the AE is responsible for the meeting notes, the plans examiners and inspectors will keep notes of decisions made in regard to the project.

Depending on the level of service selected by the customer, the plans examiner and inspector will continue to communicate through the review of the project, as major issues arise.

Please see the Team Plan Review process document for the full step by step process.

2.3 Logistics:

Coordination between the OnSchedule Coordinator and IBA Coordinator, as well as strong communication between the plans examiner and inspector will be required to make this program function properly.

2.4 Fees

Fees will be charged in accordance to the guidelines for the IBA program and the Mega project guidelines.

2.5 Grading

Projects that participate in Team Plan Review will be graded as part of the AE Pass Fail program.

2.6 Start Date

Start date is anticipated to be mid-April 2010.

2.7 To Be Determined

Technology Needs

- Button in Posse for Team Plan Review
- Notes screen in Posse that will be readily available for viewing by field inspection staff