1.0 PURPOSE:

A mandatory post-first review meeting will be required to discuss grading and improvement plan comments to provide an open dialogue and facilitate communication between the Project Team (DPW Project Manager and DPW Team Plan Processor) and the Engineer-of-Work.

2.0 BACKGROUND:

To address Project Team comments and to facilitate communication during plan processing, a mandatory post-first review meeting will required. This meeting is to open the lines of communication and to avoid or reduce confusion or conflict during the plan review process. It also allows for all parties to coordinate ideas, thoughts, and project requirements.

3.0 GUIDELINE & ROLES

The following guidelines are to be used in facilitating the mandatory post-first review meeting to assure complete submittals of project plans with subsequent submittals during the processing of plans and/or satisfaction of project conditions. These guidelines are written to accommodate most circumstances, but it is recognized unusual situations may occur which require additional or specialized steps to supplement or facilitate the plan review process.

3.1 DPW Team Plan Processor (TPP)

DPW Team Plan Processors (TPP) will notify the Engineer-of-Work when the first review of plan process is complete. The TPP will schedule a mandatory post-first review meeting to be held within 5-working days upon completion of the first review. The TPP will brief the DPW Project Manager on the comments prior to the meeting.

The TPP will generate the plan check punchlist using MS Word. The TPP will provide a copy of the punchlist to the EOW prior to the meeting to facilitate discussions. The TPP and EOW will determine which resources are required to supplement discussions during the meeting. The plan set will not be returned until the mandatory meeting is held with the EOW. The TPP will generate a cost estimate to cover all remaining staff work on the project. The TPP is the first level contact in the conflict resolution process.

3.2 DPW Project Manager

The area DPW Project Manager is the primary decision maker in the plan review process and will facilitate the conflict resolution process if required. The DPW Project Manager will participate in the Post-First Review Mandatory Meeting.

3.3 DPW Land Development Counter

The DPW Land Development Customer Service Counter staff (Counter) will process intake and return of pre-screened plans and submittals. The Counter processes all project related submittals from the applicant, makes project-tracking entries into KIVA, and routes the submittal to the assigned TPP. The Counter will re-route the plan submittal back to the Engineer-of-Work upon return by the TPP.

3,4 Engineer-of-Work (EOW)

The Engineer-of-Work (EOW) will be responsible for the project plans and shall ensure they meet County of San Diego standards, policies, rules, regulations and project requirements. The EOW will be the single source of contact with the applicant, developer, owner, or authorized agent.

4.0 PROCESS

The post-first review meeting is mandatory after the first review iteration of the project plans. The TPP is responsible for coordinating and scheduling the meeting with the EOW.

4.1 Team Plan Processor (TPP)

The TPP is responsible for coordinating and scheduling the post-first review meeting with the Engineer-of-Work.

- A "Punchlist" of the plan review comments shall be generated using MS Word during the review process. The "Punchlist" must provide a brief overview of the plan review comments and supplement comments on the plans.
- A copy of the MS Word "Punchlist" must be provided to the EOW prior to the mandatory meeting.
- A cost estimate must be generated to facilitate an additional applicant deposit to cover anticipated remaining plan processing work through approval of the plans. The TPP should consider complexity of the project and issue resolution.
- The TPP shall coordinate and hold the mandatory meeting within 5-working days upon completion of the first review.
- The TPP will brief the area DPW Project Manager on plan comments prior to the meeting.
- The TPP and DPW PM will determine if other Department or outside resources are required to attend the meeting to supplemental discussions.
- Upon completion of the post-first review meeting, the TPP will forward the plans and supporting documentation to the Counter for return to the Engineer-of Work.

4.2 Counter Processing

The DPW Counter group shall process the plans and supporting documentation. The Counter staff shall track the project in KIVA.

4.3 Project Manager

The area Project Manager will participate in the post-first review meeting and decide whether other resources are required. The DPW PM is the primary contact for conflict resolution during the plan review process and will facilitate conflict resolution.

4.4 Document Submittal

The Counter is responsible for receiving and distributing all documents and deposits submitted on the project to the Project Team. Any requests for special handling or reductions in deposit amounts are to be forwarded to the Project Manager for consideration prior to intake.

4.5 DECISIONS

Decisions within this process should be made at the staff level using the direction and guidance provided by these Guidelines, Project Manager, and Land Development Management. All critical decision points and correspondence must involve the Project Manager.

4.6 Conflict Resolution Process

All issues or concerns encountered during the first review process and/or during the Post-First Review mandatory meeting shall be resolved or addressed using the conflict resolution process in the following order:

1. Team Plan Processor - First level contact
2. DPW Project Manager - Second level contact and decision
3. DPW/DPLU Project Issue Resolution conference - Third level contact
4. Director of Public Works - Final decision

SUNSET
EFFECTIVE DATE: June 29, 2007
SUNSET DATE: June 30, 2010