

University of North Carolina
Department of Insurance TERM (Team Express Review Meeting) Information

The purpose of the TERM Program is to expedite plan reviews for projects with very special schedule needs, where the consequences of delay justify pushing them ahead of other deserving projects. The program uses a team (conference) review process to provide an atmosphere in which the design team and code consultants can interact directly and rapidly. The University's (owner's) representative and the design team come to the DOI office in order to answer questions that arise during the review, and to modify the drawings in the event an approval can be received with some very minor correction.

The TERM process is limited to reviews that can realistically be done in about a half-day by a group of code consultants representing all the design disciplines. This means that very large, complex projects do not fit the process unless they are at SD phase or merely need the resolution of some comments at revised CD or final drawings in order to obtain final approval.

To use the program:

1. The University's Capital Project Coordinator (usually the Director of Planning, University Architect, or similar position) identifies and requests that a specific project be subject to TERM. The consequences of project delay should be significant and substantiated in the request. The request should be made to Rob Roegner, roegner@ncdoi.net, (919) 661-5881, ext. 249.
2. The University's representative (the Capital Project Coordinator or his designated Project Manager) schedules a date per Rob Roegner when the University and its design team will meet with DOI representatives. For the meeting, University representatives must be present who have the authority to make binding decisions regarding the project plans.

The design team participants must include:

- a. The building/lead designer – this must be a person with the authority to make decisions and seal plans,
 - b. Other disciplines' designers (electrical, fire, plumbing, and mechanical) – again, these representatives must have the authority to make binding, sealed changes to the plans.
3. The University's design team brings the following items to the scheduled meeting:
 - a. 8 copies of the latest version of plan documents for the project,
 - b. A completed Building Code Summary (2006 version),
 - c. Written response to any previously unanswered comments,
 - d. A complete set of specifications,
 - e. A complete Life Safety Plan,
 - f. Other items as may have been requested of the team prior to the meeting (such as a completed DOI plan checklist).

What happens in the TERM process:

1. A DOI code consultant for each discipline requiring review, up to 5 reviewers, dedicate their time to review the project. At the beginning of the meeting (established in item 2 above), the design team will provide a brief “scope of project” overview.
2. Following this overview, the code consultants will disperse, taking copies of the plans for group/individual review, as appropriate, while the design team waits. The code consultants will mark up the drawings with questions and comments that come up from this review.
3. Upon completion of these reviews, the code consultants will return and the entire team will reconvene so that the consultants and design team can discuss the comments which need to be addressed, with the following possible outcomes:
 - a. If the review team determines that the plans can be modified during the review, these changes will be bubbled, signed, and dated by the responsible designer and reviewer.
 - b. If the review team determines that the plans cannot be modified during the review, the design team shall make arrangements with the code consultant to return with revised plans within five business days from the completion of review, to obtain approval. If the plans are not corrected within five business days, the plans will be moved into the conventional plan review process and will not be allowed to participate in the express review or TERM process for the life of the project.
 - c. If the reviewer determines that the comments will require further review, the design team can resubmit their plans for a second TERM review. If the deficient items are not addressed or the plans are not corrected for the second review, the plans will be returned to conventional plan review process.

It is very important to note that the determination of the severity of the plan review comments is at the discretion of the plan reviewer. Plans returned to the conventional plan review process will be reported to the University management with an explanation of why the project did not successfully complete the TERM review.

Plans may enter the TERM review process at the schematic, design development, construction design, or final document phase, but whether the project remains in the program depends on its size, complexity, the quality of plans and specifications, and timeliness of response to earlier TERM reviews. Shop drawing review, depending on size and complexity, may also use the TERM process, if, in the opinion of the reviewer, the plans are in the comment response phase.