

# HOMEOWNERS AND MEGA PROJECTS SUITE

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## Overview

The Department of Permitting, Inspections and Enforcement (DPIE) is devoted to helping and assisting our commercial and residential customers in obtaining required permits. The Mega Projects and Homeowner Suite is intended to be a valuable resource in the building permitting process to both our commercial customers that include owners, developers and contractors as well as our residential customers consisting mostly of homeowners.

There will also be a **Customer Outreach** component where various presentations will be offered to homeowners, HOAs, community civic associations, home builders associations, and contractors, to provide helpful permitting and construction information to our customers.

## Homeowners Suite

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The Homeowners Suite is capable of providing general information about permit regulations, processes, and procedures to homeowners and explains the application requirements for their project. Homeowners receiving services in the Homeowners Suite must be referred through DPIE; or services are available by appointment only. The Homeowners Suite does not provide design services nor does it provide referrals to architects, engineers or draftsmen, and does not act as a substitute for the normal residential plan review process. Some of the types of services and information provided through the homeowner suite include:

- Conflict resolution between DPIE and the homeowner or homeowner's authorized representative.
- Facilitating meetings between DPIE representative(s) and the homeowner or their authorized representative
- Providing guidelines and sample details of the more common residential projects
- Clarifying residential plan requirements and permitting process
- Providing assistance with obtaining a plat plan
- Community outreach

## How Does this Program Work?

- 1.) Homeowners who are not referred through DPIE must set an appointment with to meet with a representative in the Homeowners suite.
- 2.) Applicant must state nature or scope of meeting desired.
- 3.) Applicant will meet with a representative concerning the nature of their meeting request.
- 4.) The representative will create an electronic file and will document the outcome of the meeting.
- 5.) The homeowner will receive a standard follow up email including name, address, topic of discussion, outcome/result, and any action items regarding their meeting.
  - a. Note: If homeowner does not have an e-mail, a letter will be sent.

## Mega Projects Suite

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The Mega Project Suite is capable of assisting commercial property owners, designers, developers and contractors through the **Case Management Program (CMP)**. Owners planning to construct projects that meet the minimum requirements can request that their project be included under the Case Management Program. A request form must be completed. Once accepted into Case Management Program, a case manager will be assigned to serve as the liaison between the client and the Department. The Case Management Program is managed within the Mega Projects Suite.

Some of the services available through the CMP include the following:

- Serve as liaison and point of contact between DPIE and client to maintain effective communication.
- Review, research, and summarize project concerns.
- Schedule and facilitate pre-design consultation meetings between DPIE representatives and client
- Inform client with up-to-date status of permitting reviews and impeding issues.
- Assist with resolving permitting and inspection related issues where possible
- Keep project on target with established timeline.
- Monitor project from permit intake to permit issuance, final inspection and close out.

Our goal is to make the customers experience as convenient as possible by providing clear and concise information to move our customers efficiently through the permitting process.

## **How Does the Case Management Program Work?**

The Case Management Program (CMP) is designed to educate applicants about the permit process for their specific project before they apply for a permit. The Case Management Program strategically guides applicants from the preliminary design concept to the issuance of permits to final inspection. It allows all DPIE stakeholders an avenue to address the zoning, site and building codes and collectively identify possible issues. The program is intended to proactively track the permit application throughout the permitting process allowing DPIE to provide statuses and updates when requested. We hope this will create a win-win situation for both DPIE external and internal customers.

### **Getting Into the Program**

There are 2 ways for a project to be included in the Case Management Program (CMP) and receive special services as follows:

1. Written Request from Owner or Owner's Representative by submitting a completed request form by e-mail or hand-delivered
2. Projects deemed necessary by Deputy Director

The following types of projects would be considered for inclusion in the Case Management Program (CMP) within the Special Services Section:

- Buildings or spaces classified as use group "A" (Assembly) with an occupant load of 1,000 or more;
- New Church Buildings;
- High Hazard, "H", use groups
- Institutional, "I", use groups
- New Mercantile use groups, Open Malls, and Covered Malls, over 30,000 square feet
- All construction with an estimated construction cost of five million dollars (\$5,000,000) or more
- Prince George's County projects
- Prince George's County Board of Education projects (County Schools)

Other projects not meeting these parameters may also be included in the CMP upon written request using the request form. This form must be completed by the owner or authorized representative and be submitted to DPIE for approval and inclusion into the CMP.

Additionally, any project deemed necessary by DPIE due to priority, complexity, or scope would be added to the program with notification to the Head of Special Services Section via e-mail or written correspondence.

### **What Is Expected From Customers?**

- Submit a written request for their project be managed under the CMP
- Provide detailed description of the project and construction phasing during pre-submittal meeting.

- Identify the current and proposed use(s)
- Outline zoning, site or building code compliance issues
- Identify a point of contact for the project
- Identify a timeline
- Submit plans, permit application; correspondences through the DPIE Case Manager

### **How the Program Works**

1. A preliminary, or pre-submittal, meeting must be requested by the customer.
2. At this time, a case manager will be assigned. The case manager will be the point of contact moving forward.
3. The case manager will request the point of contact for the project as well as other project information, including
  - a. project introduction and overview
  - b. proposed meeting agenda
  - c. list of attendees
4. The case manager will then schedule an initial pre-submittal meeting with appropriate DPIE staff and the owner, developer, design team, applicant.
5. At this initial (pre-submittal) meeting, the case manager will provide guidance as to how to apply for permit, submit plans and get through the permitting process. Timelines should be discussed regarding when the application will be made and when a permit is desired. The design team should be prepared with a set of minimum 50% completed design documents for discussion. Any special design concerns should also be discussed between the design team and appropriate DPIE staff at this time. There may be subsequent meeting(s) or communication held prior to plan submittal to be coordinated with the case manager.
6. The customer will notify the case manager when they are coming in to apply for the permit and also the customer will provide the case manager with the case number assigned to their project once they've applied to the case manager.
7. Once the case manager is notified that the permit application has been made and plans have been submitted, he or she will initiate the case management process for the project as follows.
  - a. Once the permit application is made, the case manager creates an electronic file for the project using the building permit application case number for tracking. The electronic file should include
    - i. a copy of the permit application
    - ii. any correspondence in reference to the project
    - iii. meeting minutes

- iv. any future documents, other associated permits, or communication regarding the project
- b. The case is added to an electronic log or spreadsheet for tracking purposes. This will be updated regularly on a weekly basis or as needed as projects progress. This tracking log will be accessible to appropriate staff. A condensed version of the log is shown below, this will be expanded based on tracking needs.

	A	B	C	D	E	F	G	H
1		Project Information			Review Statuses			
2			Desired Permit	Application Date	MNCPPC Approval	Site/Road Approval	Building Approval	HEALTH Approval
3	Case #	BUILDING						
4								
5								
6								
7								
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11								
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14								
15								

- c. The case manager will notify the appropriate agencies of the case management project, case manager, and any relevant information pertaining to the project including the case number, permitting timeline, etc.
- d. The case manager will send a welcome e-mail to the customer or point (if previously identified) for the project introducing himself or herself as their case manager and listing what to expect from the program. A standard template or base e-mail will be used for this notification, such as shown below:

Good Afternoon,

We are assigning a case manager for this project to assist with the permitting process. Your case manager will be your point of contact and will

- Serve as a liaison between you and this Division
- Monitor the progress of your project
- Assist with keeping the project on target
- Provide review statuses
- Ensure review comments are received
- Assist with resolving permitting issues

**Your case manager is [name].** Please contact him directly as needed at 301-XXX-XXX or [name@co.pg.md.us](mailto:name@co.pg.md.us). If your case manager is not available at any time, please contact [name] for assistance.

In addition, you will have the same point of contact or case manager for subsequent trade and systems permits.

From prior e-mail correspondence with architect Steve Kunin, **the desired permit date for this project is August 31, 2013.** We will make every attempt to work within your timeline.

Thanks.

- e. The case manager will review the application, scope of work, case type, and workflow for accuracy and ensure all reviewing agencies have received their respective plan submittals. For e-Plan Review or projects using ProjectDox, the project manager must have the ability to view the progression of the reviews within ProjectDox. The case manager will take appropriate action to rectify any issues found.
8. The case manager will monitor the project and update statuses weekly onto the tracking log or as necessary. The customer will be notified of any progress or any potential issues with the case as they occur.
9. The case manager will continue to monitor the case and take appropriate action to rectify any issues found, as well as be available to provide assistance to the customer throughout the process.
10. Once all reviews are approved and the permit is ready to be issued, the case manager will notify the customer of any outstanding fees and oversee permit issuance.

### **After Permit Issuance**

After the building permit is issued, the case manager will continue to follow and monitor the project through to inspections including any trade or systems permits required, any corrections needed per Inspections, or any other activity until the permit is closed.

### **How Will the Program be measured?**

Data will be used to modify the program where necessary to improve the effectiveness. Data collected will include the following:

- Customer Satisfaction through surveys
- Number of Written Requests received in a given time frame
- Number of Appointments made by residential customers
- Number of Outreach Programs and attendance by Customers
- Overall Permitting Timeframe for projects receiving special services
- And other measures that will be later determined as the program progresses