



Facilities & Property Management: A/E Project Document Requirements

INTRODUCTION

Multnomah County Oregon (hereafter referred to as the County) establishes these standards to provide general directions and minimum requirements for the receipt and review of project documents for Facilities and Property Management (FPM) projects. Project documents are the document sets required for technical review, construction direction, and record management.

This A/E Project Document Requirements document does not attempt to include all documentation requirements for a given project, but instead identifies those project documents for technical review and those anticipated at the beginning of a project as being necessary for project close-out. The County reserves the right to amend the definition and use of these standards. The *A/E Scope of Services* is a separate document that will be provided for each project that identifies the scope and project documents for each project.

General Objectives

The County issues these standards to:

1. Ensure that project documents are clearly defined at the onset of a project.
2. Confirm that all project documents are properly developed throughout a project and comply with County standards, and
3. Require that all project documents are submitted in a timely manner.

Cross-References

1. National CAD Standard (NCS) Version 6 published by National Institute of Building Sciences (NIBS).
2. Standard Method For Measuring Floor Area In Office Buildings (June 1996)
3. Multnomah County CAD Standards (November 2016)
4. Multnomah County Specifications Standards (April 2018)
5. Multnomah County Signage Standards (August 2008)
6. Multnomah County Space Allocation Policy (July 2007)
7. Multnomah County Strategic Facilities Plan (May 2015)
8. Leadership in Energy and Environmental Design™ (LEED) Gold and High Performance Green Building (HPGB) Policy (May 2012)

Changes From Previous Version

1. Reformatted, reorganized and consolidated entire document.
2. Reduced redundancy between sections.
3. Removed Substantial Completion Set document requirement section.

4. Added Bid/Permit Set AutoCAD base plan requirements.

A/E Service Provider Responsibility:

The County requires that all project documents submitted by the A/E Service Provider comply with these standards. An A/E Service Provider is defined as an organization contracted to provide professional services requiring planning and/or design work, and may include architects, engineers, consultants, drafting services, furniture installers, interior designers, space planners, and/or design-build contractors.

Submit a request to the County Project Manager for any deviation from these standards. The County Project Manager (hereafter referred to as the Project Manager) is the person designated to represent the County on issues for a specific project. The County will review the request and respond with a written authorization of acceptance or explanation of denial.

TECHNICAL REVIEW

The A/E Service Provider shall thoroughly review, check, and correct their documents prior to submittal to the County Project Manager. The County requires the A/E Service Provider to submit documents identified in the negotiated *A/E Scope of Services* for periodic review by the County. The County review provides a means to assure conformity with County policies, standards, and guidelines. The County reviews are not intended to replace the quality control process of the A/E Service Provider or to relieve the A/E Service Provider of their legal and professional responsibilities with respect to code and other jurisdictional requirements, project design and documentation.

The County reviews specifically for format and content in project specifications, drawings, O&M Manuals, and reports. The County uses Bluebeam and AutoCAD software to review these documents. Comments are submitted by the County Project Manager to the A/E Service Provider via Bluebeam and a Technical Review Checklist (Form 165), which notes any deviation from the County CAD/BIM standards. A copy of the Technical Review Checklist is provided to each A/E Service Provider to assist in their in-house technical reviews in anticipation of the County review.

The County requires up to 10 business days to conduct technical reviews depending on the complexity of the project. Shorter times may be negotiated with the Project Manager. The “% complete” for document sets to be reviewed shall represent the minimum level of completeness that is acceptable for all submitted documents (e.g. drawings, specifications, and other work products) from all disciplines (e.g. architectural, mechanical, and electrical).

County Comments:

The County will provide general comments (e.g. questions and suggestions) for the A/E Service Provider to take under consideration. Partial submittals will be returned to the A/E Service Provider without comment. Where technical reviews comprise a portion of the A/E performance evaluation, the County will assess the number and impact of review comments. The County will also compare the previous technical review with the current submittal to assess A/E responsiveness. As a guide:

1. Resolved comments from prior reviews will not appear in subsequent reviews.
2. Unresolved or partially resolved comments from prior reviews will carry over to the next technical review.

A/E Response:

The A/E Service Provider will forward their response to the technical review comments via Bluebeam (and the Technical Review Checklist Form 165, if needed) to indicate:

1. Agreement: The A/E Service Provider shall resolve the subject matter and incorporate those changes in the next version of the documents. No comment or response needed.

2. Disagreement: The A/E Service Provider shall provide an explanation why the subject matter will not be addressed (or will be resolved in a manner different from that suggested by the comment).

REPORTS

Reports are informational documents developed or prepared by the A/E Service Provider for use by the County. For example, the A/E Service Provider may prepare a structural evaluation report, a seismic report, or a feasibility study. Refer to the negotiated *A/E Scope of Services* for additional requirements.

Format

The County requires that all reports adhere to the following format:

1. The report shall be in Adobe Acrobat PDF format.
2. The report includes a Table of Contents.
3. The report includes electronic bookmarks for each section as identified in the Table of Contents.
4. The front cover includes the following information:
 1. Title of the report.
 2. County project name and number.
 3. County building name and number (if applicable).
 4. A/E Service Provider's name.
 5. Date of issue.
5. The Title Page includes the following information:
 1. Subject matter included in the report.
 2. County project name and number.
 3. County building name, number, and address.
 4. A/E Service Provider's name and address providing the report.
 5. Date of issue.
 6. Cross-reference to other related reports.

PROJECT DOCUMENT SETS

See *The Architect's Handbook of Professional Practice (Current Edition)* for further definition and description of design phases. Refer to the negotiated *A/E Scope of Services* for additional requirements.

The **Schematic Design (SD) Set** includes the A/E Work Plan including a program statement, design intent narrative, drawings, and project alternatives; Project Schedule; ROM Cost of Work; Drawings; and other work products developed during the schematic design phase of a project.

The **Design Development (DD) Set** includes the A/E Work Plan including a program statement, design intent narrative, drawings, and project alternatives; Project Schedule; Estimated Cost of Work; Outline Specifications; Drawings, calculations, and other work products developed during the design development phase of a project.

The **Construction Document (CD) Set** includes the A/E Work Plan including a program statement, design intent narrative, drawings, and project alternatives; Project Schedule; Cost of Work; Specifications; Drawings, calculations, and other work products developed during the construction development phase of a project.

The **Bid/Permit Set** includes bid information, all documents, and addenda as required to solicit general contractor, prime contractor, subcontractor, and material vendor bids.

The A/E Service Provider submits documents (specifications, drawings, and other work products) to the County for the Project Manager to assemble with the Bidding Pages and Division 1 into the Bid Set. Separately, the A/E Service Provider will forward changes to these documents (specifications, drawings, and other work products) for inclusion by the County into addenda to the Bid Set. **Also, submit electronic AutoCAD files for the Architectural Base floor plans, including systems furniture, and, if applicable, the Site Base plan.**

The **Project Record (PR) Set** includes all final as-built documentation of work for a specific project **and** updated base plans. The as-built documentation consists of the Project Record Documents, approved change orders, and modifications in work and/or deviations from the original contract documents. Where the project is partially designed, partially built, or not built, the Project Record Set may be the final record of the proposed work.

Submit **no later than 45 calendar days after Substantial Completion** by the contractor or receipt of a Certificate of Occupancy from authorities having jurisdiction (whichever occurs later). All documents must be received, reviewed, and accepted by the County prior to final payment to the A/E Services Provider.

Project Document Requirements Table:

Set	A/E Work Plan	Project Schedule	Cost of Work	Specifications	Architectural Base Floor Plans w/ systems furniture and/or Site Plans (AutoCAD)	Project Drawings (AutoCAD/ Revit)	Project Drawings PDF*	A/E Technical Review Responses
SD	X	X	ROM				X	
DD	X	X	X	Outline		X	X	X
CD	X	X	X	X		X	X	X
Bid/Permit				X	X		X	
Project Record					X	X	X	X

Project Document Formats:

Comply with the latest version of the following:

1. *Multnomah County CAD/Revit Standards.*
2. Create Electronic Transmittal (eTransmit) Package to deliver CAD/Revit files. Include all related dependent files such as xref, font and image files.
3. Convert each drawing sheet from CAD/Revit into an individual Adobe Acrobat PDF File and use the Sheet Identification as the Filename for the drawing sheet.

*Create and provide a PDF linked drawing set at the completion of new construction or major renovations.