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# Stakeholder Document Review Process

# OVERVIEW

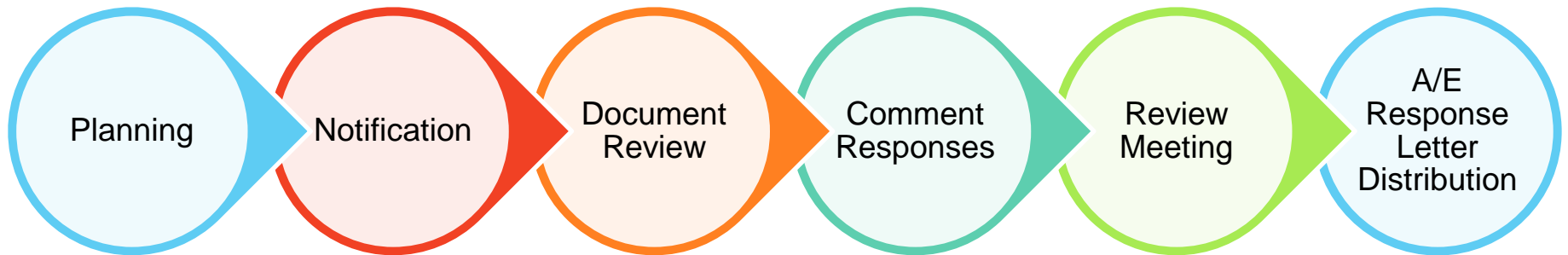


# Project Stakeholder Document Review Process

- Every project to have at least one review  
(unless agreed otherwise by PM and TSG)
- Project manager and TSG to work together
- Each step can be adjusted to meet project needs
- Review process can be concurrent with design



## Six Easy Steps



Sometimes a page turn with the right stakeholders is all that is needed



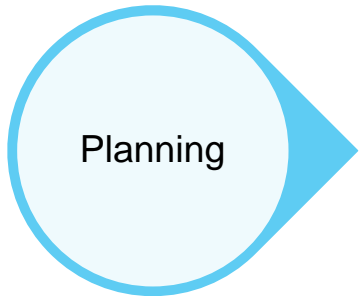
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# THE STEPS



## Step 1: Planning

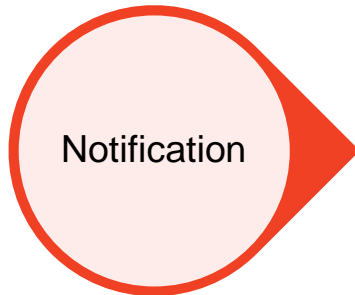
- PM works with TSG
- If necessary, set date/duration of review and identify appropriate stakeholders





## Step 2: Notification

- PM submits notification information to FDC Administrative Assistant at least 10 days prior to review start date
- FDC Administrative Assistant will send out notifications





Facilities Design and Construction  
Project Stakeholder Document Review  
Exhibit 1 - Notification Data Sheet  
fod.osu.edu/design-and-construction

Project Name:		Project #:	
Project Description:		Total Project Budget:	
		Zone & District:	
Multiple Bid Phase:	Bid Package #:		Bid Package Estimate:
Project Manager:			
TSG Rep.:			
Delivery Method:			
A/E Name:			
Criteria A/E Name (For Design-Build Projects) :			
<u>Milestone Dates</u>			
Notification Date:		Review Level:	<input type="radio"/> SD <input type="radio"/> DD <input type="radio"/> CD
Document Delivery			

# Exhibit 1: Notification Data Sheet





Facilities Design and Construction  
**Project Stakeholder Document Review**  
**Exhibit 2 - Notification List**  
 fod.osu.edu/design-and-construction

**Table 2**

**Facilities Operations and Development**

<b>Name</b>	<b>Title</b>	<b>Department</b>	<b>Email Address</b>
<Name>	Project Manager	Design and Construction	<email address>
<Name>	Contracts Administrator	Design and Construction	<email address>
<Name>	Interior Designer	Design and Construction	<email address>
<Name>	Director of Projects	Design and Construction	<email address>
<Name>	Director	Energy and Sustainability	<email address>
Robert Baughman	Manager	Fire Safety Systems OPS	<a href="mailto:baughman.182@osu.edu">baughman.182@osu.edu</a>
Kelly Bloomfield	Manager	Building Automation OPS	<a href="mailto:bloomfield.40@osu.edu">bloomfield.40@osu.edu</a>
Kenny King	District 1 Leader	Operations	<a href="mailto:king.407@osu.edu">king.407@osu.edu</a>
Darlene Gluck	District 2 Leader	Operations	<a href="mailto:gluck.17@osu.edu">gluck.17@osu.edu</a>
District 3 (Wexner Medical Center)	See Table 11		
Lance Bloomfield	Bldg. Specialist	Operations	<a href="mailto:bloomfield.2@osu.edu">bloomfield.2@osu.edu</a>
<insert name>	Zone Leader (District 1 or 2)	Operations	<email address>

# Exhibit 2: Notification List



## Step 3: Document Review

- A/E submits documents to OSU (if applicable)
- PM confirms document content is correct
- Stakeholders review documents
- Stakeholders submit comments (as identified on the notification)





Facilities Design and Construction  
**Project Stakeholder Document Review**  
**Exhibit 3 - Document Content Expectations**  
 fod.osu.edu/design-and-construction

These are the typically required documents and shall have sufficient information presented for stakeholders to understand the goal and scope of the project and/or for the contractors to price a not-to-exceed number for the cost of the project. Provide only what applies to the project.

Item #	Description
1	Previous review comment responses if applicable
2	Design Intent Statement - Narrative of missing/incomplete design information
3	Project Definition or Owner's Project Requirements(OPR)
4	Basis of Design (BoD) for each discipline
5	Complete Drawing Set
6	Project Manual
7	Cost Estimate
8	Project Schedule
9	Not Used
10	Calculations - for applicable disciplines including, but not limited to, MEP, civil, structural, etc.
11	HVAC, electrical, and plumbing cut sheets
12	Tree Survey if applicable
13	Green Build Policy Narrative(s): Narrative description of proposed building system modification option to show, in compliance with the OSU Green Build and Energy Policy #3.10 ( <a href="https://ap.osu.edu/sites/default/files/310_green-build-energy.pdf">https://ap.osu.edu/sites/default/files/310_green-build-energy.pdf</a> ) including MEP system conceptual diagrams and Life Cycle Cost Analysis in compliance with Appendix C of the Building Design Standards. MANDATORY FOR ALL PROJECTS GREATER THAN \$99,999.
14	All LEED Projects must submit the LEED Score sheet and LEED Boundary documents for approval by the University Engineer and University Architect. Provide both print and pdf formats.

Resources

# Exhibit 3: Document Content Expectations

(included with notification form)



## Step 4: Comment Responses

- A/E provides response letter to PM





### Reviewer Instructions

Exhibit 4

Below are Comments examples.

#	Init.	Dept.	Cat.	Reference	Comment	A/E Response
	SAA	TSG	Gen	Cost Estimate	Comment goes here. Comment goes here. Comment goes here. Comment goes here.	
	TGM	EHS	Spec	02 05 84	2 4A: Comment goes here.	
	HJD	UT	Dwg	E-5	Coded Note 3: Comment goes here.	

As you are reviewing the drawings and specifications please record all comments in the red-tabbed "Comments" Worksheet.

Enter your initials in the Init. column, and enter your department in the Dept. column (use CAPITAL letters).

In the Cat. (Category) column, type one of the three options: Gen, Spec, or Dwg.

Gen = General Spec = Specifications Dwg = Drawing

You will need to type in the information in the reference cells.

For Specification references please space out the section numbers, as this facilitates readability.

Correct: 02 05 11 Incorrect: 020511

Each cell should contain 1 comment.

If the specific specification section has several comments, 1.04, 1.05, etc. They each should be an individual comment.

All Attachments should be emailed in PDF format to the persons designated in the review notification.

Please save file as *Project Number* , *Project Name* (abbreviated), and *Comment Reviewer Initials* (ex. OSU-090909 Scott Hall MAS).

E-Mail the letter containing your comments to the person designated in the review notification.

# Exhibit 4: Review Comment Letter Template



## Step 5: Review Meeting

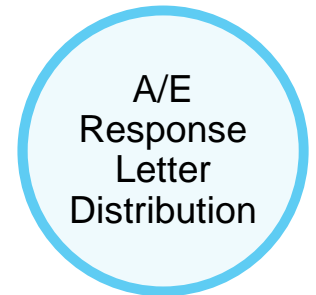
- PM schedules room and invites stakeholders to comment review meeting (if needed)





## Step 6: A/E Response Letter Distribution

- PM distributes final A/E responses to stakeholders
- Stakeholders review responses and notify PM if additional follow up is needed
- PM ensures all comments are addressed/resolved





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# SUMMARY





# Remember...

**Follow the  
process  
for every  
project**

**Your  
TSG rep is  
available  
to help**

**The  
process is  
six easy  
steps!**



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# QUESTIONS