

## SPECIFICATIONS PRODUCTION AND COORDINATION PROCESS

We're excited to start working with your office on this Project. A staff person in our office will manage the specifications production process, with other staff assisting as necessary, and they'll serve as your primary contact within our office.

Either as an introduction to a new client of ours or as a refresher from since we last worked together, I'd like to introduce you to our specifications coordination and Project Manual process.

We'll be happy to review this process when we meet for the spec's kick-off (described below), but this basically works as follows:

- We hold a **specifications kick-off meeting** six to eight weeks prior to the first deliverable, to get to know the team and the project.
- We'll request the latest set of drawings to better understand the scope of work and specifications that should be produced.
- We'll share a **Draft Table of Contents (TOC)** soon after our specifications kick-off meeting, for your review.
- We hold **3 or 4 weekly specifications coordination meetings** with your internal design team – See below. (For Schematic Design or other phase Outline Specifications, we'll compress the above schedule to two weekly specifications coordination meetings.)
- For consultants' specifications, we'll:
  - ... provide a **Section Template** for their use to coordinate format, headers, footers, etc.
  - ... collect the consultants' sections and compile them into the **Project Manual** at each deliverable.
  - ... return revised versions of any sections in which we made minor revisions for coordination or formatting reasons, for use going forward.
- After the 100% DD Phase deliverable, we'll provide a link to a **Coordination Matrix (CM)** in Google Sheets for interactive coordination of materials, systems, products and finishes with your team.
- After each deliverable, if desired/ helpful, we'll provide a **Bluebeam session** of the Project Manual for on-going review and comment.

The **specifications kickoff meeting** to review the project would be with your internal team, and include reviewing the latest drawings, renderings, and other supporting information about the project, the deliverables schedule, and any other important aspects of our scope and team interaction.

Meeting, *Week of [5 or 6 weeks prior to deliverable]*

The **weekly specifications coordination meetings** to review the project would be with your internal team, and happen as follows:

Meeting 1, *Week of [4 or 5 weeks prior to deliverable]* - Div's 02, 03, 04, 05 and 06: Structural (*good to have the Structural Engineer on the call if available*)  
02 - Existing Conditions

- 03 - Concrete
- 04 - Masonry
- 05 - Metals
- 06 - Wood, Plastics, and Composites (Structural portions)

Meeting 2, *Week of [3 or 4 weeks prior to deliverable]* - Div's 07 and 08: Exterior envelope (*good to have the envelope consultant on the call, if one is on the team*)

- 07 - Thermal and Moisture Protection
- 08 - Openings

Meeting 3, *Week of [2 or 3 weeks prior to deliverable]* - Div's 10, 11, 12, 13 and 14: Specialties, equipment, etc.

- 10 - Specialties
- 11 - Equipment
- 12 - Furnishings
- 13 - Special Construction
- 14 - Conveying Equipment

Meeting 4, *Week of [1 or 2 weeks prior to deliverable]* - Div's 06 and 09: Interiors (*good to have the interior designer on the call*)

- 06 - Wood, Plastics, and Composites (Interiors portions)
- 09 - Finishes

(For Schematic Design or other phase Outline Specifications, we'll compress the above schedule to two weekly specifications coordination meetings.)

The **Project Manual** will be compiled and delivered as follows:

- We'll provide a **Section Template** as soon as we know the correct deliverable name and date and the official project name.
  - This info will go into the headers of the sections and on the Project Manual cover. This information should match what's shown in the Drawings' title blocks and cover sheet.
  - Your office will distribute the Section Template to the consultants' for use in aligning their sections' format and headers/ footers with the project standard.
- We'll request that consultants provide their sections no less than 30 hours prior to when our office needs to deliver the Project Manual to your office (e.g. by noon the day prior for end-of-day deliverable).
  - Consultants will need to deliver their sections in both MS Word and PDF formats, allowing us to make minor revisions if necessary.
  - We'll always send back any revised versions (usually for minor formatting issues) for the consultant to use going forward.
- We'll compile the **Project Manual**:
  - We'll combine all the sections, including the General Conditions (Div'n 01) and Arch'l sections (Div's 02-14) that we produce into Volume 1.
  - We'll combine all the sections into Volumes 1 (Div's 01-14) or Volume 2 (Div's 21-33), including the consultants' sections, covers, table of contents, Owner's preferred contract

documents (e.g. General Conditions, Seals Page), any appendices (e.g. Geotechnical Report, Acoustical Report), etc.

- We'll deliver a turn-key **Project Manual**, fully vetted and cross-checked by our staff who are independent of the project, ready for delivery to the Owner, printer, Contractor, etc.

We look forward to starting this project with your team!

Sincerely,



Michael Thrailkill AIA, NCARB, CDT, LEED AP