

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, including a review of **meetings** we'll hold with you and the **deliverables** we'll publish.

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.

Project 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.

SD Kickoff Meeting, *Week of [3 or 4 weeks prior to deliverable if project will start in SD Phase]*

DD or CD Kickoff Meeting, *Week of [7 or 8 weeks prior to deliverable if project will start in DD or CD Phase]*

SD phase specifications coordination meetings to review the project would be with your internal team, and happen as follows:

SD Meeting 1, *Week of [2 or 3 weeks prior to deliverable]* for **Div's 02, 03, 04, 05, 06 and 07**: Structural focus (*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
- 07 - Thermal and Moisture Protection

SD Meeting 2, *Week of [1 or 2 weeks prior to deliverable]* for **Div's 08, 09, 10, 11, 12, 13 and 14**: Specialties, equipment, etc.

- 08 - Openings
- 09 - Finishes
- 10 - Specialties
- 11 - Equipment
- 12 - Furnishings
- 13 - Special Construction
- 14 - Conveying Equipment

DD phase specifications coordination meetings to review the project would be with your internal team, and happen as follows:

DD Meeting 1, *Week of [4 or 5 weeks prior to deliverable]* for **Div's 02, 03, 04, 05 and 06**: Structural focus (*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)

DD Meeting 2, *Week of [3 or 4 weeks prior to deliverable]* for **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

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

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

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

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

09 - Finishes

CD phase specifications coordination meetings to review the project would be with your internal team, and happen as follows:

CD Meeting 1, *Week of [6 or 7 weeks prior to deliverable]* for **Div'n 01**: General Requirements (*good to have the Owner's Representative or CMGC Partner on the call if available*)

Div'n 01 Questionnaire review

Allowances, Unit Prices, and Alternates

Delegated Design requirements

Mockup requirements

Sustainability

Hazardous Materials

CD Meeting 2, *Week of [5 or 6 weeks prior to deliverable]* for **Div's 02, 03, 04, 05 and 06**: Structural focus (*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)

CD Meeting 3, *Week of [4 or 5 weeks prior to deliverable]* for **Div's 07 and 08**: Exterior envelope 1 (*good to have the envelope consultant on the call, if one is on the team*)

07 - Thermal and Moisture Protection

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

08 - Openings

CD Meeting 5, *Week of [2 or 3 weeks prior to deliverable]* for **Div's 10, 11, 12, 13 and 14**: Specialties, equipment, etc.

10 - Specialties

11 - Equipment

12 - Furnishings

13 - Special Construction

14 - Conveying Equipment

CD Meeting 6, *Week of [1 or 2 weeks prior to deliverable]* for **Div's 06 and 09**: Interiors (*good to have the interior designer on the call*)

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

09 - Finishes

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, reviewed and cross-checked** by 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