

DB'S CORNER: BLOG 20 - The Specifier and Consultants

By Dennis Buirge

Working as a Project Manager (PM) and now in my later days as a Specifier, brings recollections of drawing on my palm with a finger while being in a street huddle during my teen years in the early to mid 60s: *Billy, you line up on the left and do a down and out; Timmy, you line up on the right and do the same thing; Donny, you line up next to Billy and run to Miller's mailbox and button hook; Jimmy, you line up next to Timmy and cross over the middle about 20 yards from scrimmage running straight to Fifield's maple tree; and Mikey, you line up next to Donny and run a post while Gordy hikes and blocks for me.* Gordy had the greatest girth, but not the greatest pair of hands. After the hike, everyone ran their routes while the defense tried to prevent each player from being open with the proverbial bump/block/push, but somehow, someone seemed open enough to occasionally catch the ball. Crossing the stop sign for a touchdown before entering the intersection was always cause for celebration. So it sometimes seems when working with consultants to get the project manual done and out for bid.

My aforementioned recollection follows the introductory statement concept in the movie, *The Big Year*, which states, "The following is a true story; only the facts have been changed." 'The Architect is like the quarterback' was a simile heard early in my career. As part of the design-bid-build proposal process, the architect is normally the one controlling the project. The architectural office selects a PM and design team while inviting selected engineers and consultants (E/Cs) to furnish firm resumes and desired fees, after which the entire RFP response is finalized and submitted to the Owner. Once the Owner selects the architectural firm, the game begins. Today, however, being chosen by the Owner may be the more intense part of the contest. I recently heard of a local public organization wanting to create a \$12 million addition to their facilities and selected an out-of-state company, one of 63 architectural firms who submitted a response.

Once selected, it is usually the PM who initiates contact with the Owner and translates the discussed program with the design team. For most architectural projects, engineers, whether in-house and/or consulting, would include basic work scopes of plumbing, HVAC, electrical, and civil designs. Depending on the project scope and complexity, additional consultants could include in no particular order: interiors, landscape, communications and security, acoustical, geotechnical, kitchen, transportation, cost estimators, and potentially a few others. The architect's detailed contractual relationships with E/Cs during a project are significantly different than those activities occurring with manufacturer's representatives (refer to previous Spec Den Blog #19).

When all project E/Cs have entered the fray, coordinating activities to bring the team to its successful conclusion must occur via the architect, the PM. There must be a careful guiding hand, being involved and giving sufficient information while not micromanaging everyone's actions. Proper guidance can require a delicate touch, like the overthrown pass caught on the receiver's fingertips. Though some difficulty seems to take place on each project, it somehow gets resolved during the design process. Otherwise, like in the football game there will be a penalty, or in our case ... a change order.

For the project manual, the Specifier acts like the offensive coordinator who coordinates action among the entire design team. This includes communication with the PM, Project Architect, and various designers in the architectural firm to translate design intentions into selected assemblies and products that are properly specified. Actions also include communication with each of the project E/Cs. Although seeming to be of minor importance, goals to be achieved include correct use of headers and footers, following the established SectionFormat and PageFormat, not respecifying information already contained in Division 01, properly identifying work in multiple prime contracts, and using proper language (imperative and not indicative mood) and terms (like 'provide' instead of 'furnish and install'), in order for the project manual to be technically correct, while creating a harmonious aesthetic. Decades ago I entered the national specification writing competition to receive feedback on the architectural Sections, knowing the possibility of receiving any award was non-existent. While positive comments were received regarding the architectural Sections, comments regarding the consultant's specifications were anything but effusive.

One action by the Specifier to guide in proper specification creation is to forward a guide or sample Section to each E/C identifying the header/footer and PageFormat, along with a polite warning of potential consequences for not following the guide. Each of their specification writers are then obligated to follow that standard. If not, the architect is within rights to require the E/C to reconfigure their specification to the project format.

Lastly, there must be coordination during the entire design process and various deliverables to the Owner in compliance with the Owner/Architect Agreement. This requires the architectural team to forward its information to the E/Cs in a proper time frame, allowing for completion of their work in a timely manner for each submission. Depending on the Agreement, the schematic design deliverable could include no project manual information, a Preliminary Project Description, a narrative, or just the Table of Contents (TOC). To complete a TOC, E/Cs must forward proper specification Section Numbers and Titles following the Construction Specification Institute (CSI) current MasterFormat protocol. The design development deliverable could include a repeat of the TOC, an outline specification, some type of abbreviated specification, or a progress version of the final specifications, while the contract document deliverable will contain the final project manual with all specifications.

Although I generally am not into the touchdown celebration antics of 'professional' players on TV, there is a want to do a touchdown dance when completing the project manual and sending it the printer, as well as after the extra point ... sending the last pre-bid Addendum.