

*Providing compete construction specifications documentation, systems and performance descriptions, and risk and quality advisory services.*

Conspectus's Tech Tips received the national Communications Award from the Construction Specifications Institute.

**ABSTRACT:**

Specifications are important regardless the size, scope, complexity, and dollar value of the construction project. Carefully select the form to suit the project. Remember specifications are one of the four documents AIA requires to form a complete construction contract.

**FILING:**

UniFormat™  
Z General

MasterFormat®  
Specifications Group

**KEYWORDS:**

Specifications, Drawing Notes, Sheet Specs, Spec Book, Project Manual, contract, agreement, conditions, drawings

**REFERENCES:**

American Institute of Architects  
A101 - Standard Form of Agreement Between Owner and Contractor where the basis of payment is a Stipulated Sum.  
A107 - Standard Form of Agreement Between Owner and Contractor for a Project of Limited Scope.

Construction Specifications Institute:  
MasterFormat® - Master List of Numbers and Titles for the Construction Industry.  
SectionFormat™ - The Recommended Format for Construction Specifications Sections.

## Specs Are Important

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### Introduction

Specifications are important regardless the size, scope, complexity, and dollar value of the construction project. Construction contracts, according to AIA standards, consist of the agreement, the conditions, drawings, AND specifications.

- The agreement defines the parties to the contract, the cost, and the time to complete the work.
- The conditions set the legal responsibilities of each party to the contract and the method for resolving disputes.
- Drawings define the quantity, size, location, and relationship of each component in the work.
- Specifications establish the procedures, products, and quality required for the completed work.

When any one of these elements is omitted or marginalized, the completed project may not fully meet expectations.

### Forms of Specifications

Specifications can take numerous different forms: the traditional project manual, a specification book, sheet specs, and drawing notes. All forms can serve the same purpose, but with varying degree of detail. A \$20,000 modification to a building to install a ramp and make the entry accessible likely does not require the same detail as new \$2 billion resort. Select the spec form and level of detail to suit the particular project.

### Specify How, What, and Where

Regardless the form, each specification must convey what products are required for the project and how those products are incorporated into the work. These two pieces of information will control the project quality.

Specifications may include where the products must be installed. Specifying where is helpful when multiple products of the same type are required and when the location of each can be stated clearly. For instance: provide tempered glass for glazed doors and sidelights, and provide annealed glass for other locations. With this simple sentence, the types of glass are specified for every location. Drawing notations for glass types are unnecessary. Specifying where products must be installed is a powerful way to ensure each instance is controlled by the spec. See blog entry Specs Must State the Architect's Intent for more discussion on this subject. Regardless of the spec form, designers will benefit from following MasterFormat® as a checklist for specifications. This will help ensure that all subjects required for the project are included. Keep the specs in the industry accepted order to help the contractors find the information, easily.

### Drawing Notes

Drawing Notes are often the preferred spec form for residential and small scale commercial projects. Notes can be developed and maintained in a word processing file and then

imported into the drawing files. Using this approach allows easy editing and reuse of Drawing Notes on future projects.

Drawing Notes are the most abbreviated form of spec. Often Drawing Notes specify products by a single manufacturer or product name. Each spec section may be reduced to a few sentences. **Caution:** Be sure to specify products with the required options, even in this short form. Drawing Notes usually include a broad statement that products must be installed according to manufacturer's instructions. Additional notes specifying installation are limited to those issues that are critical to the project's success. **Caution:** When relying only on manufacturer's instructions, be sure you know what the instructions require.

## Sheet Specs

Sheet Specs are a compromise between Drawing Notes and a Spec Book. Sheet Specs are usually arranged by specification section, following MasterFormat®. The spec sections are written using Level 1 (Division) or Level 2 (broad scope) titles with related subjects in a single section. Narrow scope sections will be rare, and only for specialized products and systems. Because of the brevity of Sheet Specs, the same cautions for Drawing Notes still apply. Administrative issues will be specified broadly for all spec sections in Division 01 sections. Submittals, for instance, will be specified only in Division 01. And submittals will be universally required for each product. Sheet Spec word processing files are imported into drawing files. Sheet Specs usually occupy multiple drawing sheets. The **Advantage:** Sheet Specs are integral with the drawings.

## Spec Books

Spec Books are the formal form, most readily recognized as specs. Specifications are documents, called sections, organized by MasterFormat® found in Divisions 01-49. Specifications include General Requirements and all the technical sections to describe a construction. Each section is written following SectionFormat™ and is organized in three parts: Part - 1 General, Part 2 - Products, and Part 3 - Execution. The spec sections are written in either full length or short form. Full length specs are, as the name implies, lengthy - including nearly everything imaginable about each subject. The short form spec is an abbreviated full length spec. The brevity is achieved by efficient language, streamlining, and imperative style, and reduced detailed requirements.

**Note:** Conspectus has successfully used short form specs on very large, complex projects. Do not assume that a big project requires a lengthy spec. Choose wisely.

## Project Manuals

Project Manuals are an expansion of a Spec Book. Project Manuals include specifications and other non-specification documents. Documents such as Division 00 - Procurement and Contracting Requirements (forms, agreement, and conditions) and informational reports are NOT specifications even if they are in Project Manuals.

A Project Manual is the collection of all written documents that must be issued to a contractor as part of a construction contract. Project Manuals may include schedules, drawings, and other items that are easily formatted and bound within a printed book. Of course the printing aspect is

becoming less relevant as documents are distributed electronically.

## Conclusion

Select the spec form carefully. Match the spec form with the degree of detail necessary to clearly convey to the contractor what is required to ensure the proper result. Consider the risk of brevity when making the final selection. Then specify the entire extent, regardless of form, needed to convey the design intent. Each spec form is not governed by rigid rules. So combine and adjust the spec form as needed to properly suit the project.

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