



SPEC KICKOFF HUDDLE (MEETING) - AGENDA

- 1.1 Find most recent agenda here:
<http://www.byunpartners.com/documents/SpecKickoffMeeting.pdf>



QR code of this document, iPad friendly.

- 1.2 Express any “burning” questions before we get started.
1. We have lot to cover.
 2. Such questions may be incorporated into this document.
 3. Do read this document prior to discussion.

1.3 INTRODUCTION

- A. Summary: Kickoff meeting with all new Project Manager is required. Can be done over the phone.
- B. Audience: Spec writer, project manager/job captain, principal in charge (optional), and design team member (optional).
- C. Duration: One hour. (Less if you have read the document; longer if you have NOT read the document prior to the meeting.
- D. Theme: Align strategic vision with Architectural principles.
 1. I know your ideas are unique but contractor has to bid this with his money on the line.
 2. We all have budget constraints. Don't over design; if we do, we have to re-design on our dime.
 3. Brain dump and lessons learn:
 - a. In-house spec writer: Lion at zoo. – know the drill.
 - b. Independent spec writer: Lion in the wild – survival of fittest.
 - c. Interface with dozen different firms – even more different PMs.
 - d. Built-in corporate memory.

4. Grocery store is organized around a taxonomy (Meat > Beef> Steaks>Sirloin). Similarly, specs are organized in broad or narrow scope spec sections within each individual division numbers.

1.4 PROJECT OVERVIEW

- A. Got renderings?
- B. Plans.
- C. Elevations.
- D. Details.

1.5 SPEC BOOK

- A. Basic: Spec book should only be prepared if you are getting a separate fee or AHJ requires it. Otherwise organize all products on the Drawings.
- B. Cover: I create generic spec cover from your drawing cover sheet. If you need a fancy cover, please provide one.
- C. Signature/seals page: By architect. Create one and route for seal. Provide to spec writer. (One of the last task done prior to submitting to authority having jurisdiction – do not delay. Get it done ahead of time)
- D. Table of Contents:
 1. I identify party who wrote the section. Makes it easier during Construction Administration.- Inserting total pages of each section is total waste of time.
 2. Consultant to provide their Section Table of Contents for me to copy and paste. They should be identical to what they are actually providing.
- E. General Conditions:
 1. Default: AIA A201.
 - a. Article 3.12.4: Shop Drawings are NOT Contract Documents.
 2. I need to see if we are using any other flavor. (School Districts, hotel developers, etc.)
- F. Division 0: Invitation to bid, bid documents, etc. are NOT part of spec fee.
 1. They are “legal” documents. Best prepared by Owner’s legal team.
 2. Architect “may” assist to limit legal liability.
- G. Division 1:
 1. Alternates:
 - a. This has special meaning in construction. Does not mean a product is “equal”.
 - b. Contractor has to bid this item separately. Owner may or may not take it.
 - c. But, need to design completely. Can’t re-design after acceptance.
 - d. Do not have more than two. Better not to have it at all; eats up profits.
 - e. List them on the drawings. – on the Drawing cover page.
 2. Allowances:

- a. Similar to Alternates but Architect has to come up with dollar amount (not the contractor).
- b. List them on the drawings. – on the Drawing cover page.

H. Division 8:

1. Heavily depended on Door Schedule. Sample of properly prepared Drawing sheets are available.
2. Door Schedule: Bird's eye view of what you have without reading the spec book.
 - a. Identify any fire-rated doors first as they will dictate materials used.
 - b. Identify material in detail: Not metal; be more specific like aluminum or hollow metal.
 - c. Identify aluminum factory finish: Anodized – clear or color. Kynar.
 - d. Factory finish vs field finish.
3. Do's and Don'ts:
 - a. Do use firm-wide door schedule template. Fill in as project progress. (do not let each PM come up with their own template)
 - b. Door Schedule: Do have different column for door and frame – material and finish.
 - c. Door Schedule: Do use Comment/Notes column to communicate any options.
 - d. Don't field paint aluminum – best to factory finish. (but do identify what they are Kynar vs clear anodized)
 - e. Don't use aluminum anything for fire-rated assembly - very expensive. Use HM instead.
 - f. Don't use wood doors at exterior application – limited warranty and maintenance issue.
 - g. Don't use All Glass Entrances at exterior application – they are not weather tight. If must use, locate them under an over-hang.
4. Title 24 Energy Calculations: Do not confuse center of glass value vs fenestration as whole value (glass + frame). You always lose performance with frame. That's the reason we use thermal break frames.

I. Division 9:

1. Heavily depended on Finish Schedule. Sample of properly prepared Drawing sheets are available.
2. Finish Schedule: Bird's eye view of what you have without reading the spec book.
 - a. Identify all finishes here. Call out, manufacturer, style, size, finish, color, etc.
 - b. Material selection: Best to single source. Select paint colors from one vendor.
 - c. Do not duplicate door schedule information. Actually, do not duplicate anything. It's a drawing maintenance issue.
 - d. Keynotes:
 - 1) Needs to be super consistent. TPO vs PVC vs Built-up.
 - 2) Drawings shows what goes where.
 - 3) Spec explains what it is.
 - 4) GL1, GL2 vs 088000.A, 088000B (“Possible but not good idea”).
 - 5) Spec numbering: Broad scope and narrow scope.
3. Do's and Don'ts:
 - a. Do use office Finish Schedule template. Fill in as project progress. (do not let each PM come up with their own template)
 - b. Do have separate columns for material and style.
 - c. Do have “comment” column indicate any options. – Manual vs motorized.
 - d. Do let me know if you have Interior providing Finish Schedule.
 - e. Do have TCNA tile installation method details on the drawings.

- J. Division 10:
 - 1. Toilet Accessories: Best have Bobrick Model numbers in your standard details. Sample of properly prepared Drawing sheets are available.
- K. Public bid projects:
 - 1. Or equal: Everything is fair game. – cost less to client.
 - 2. Do not exclude particular products or methods explicitly. – You may not know the latest and the greatest technology. Unless you know for sure.

1.6 CLIENT'S MASTER SPEC AND DESIGN STANDARDS

- A. Wild Goose Chase: I need to see if there are any specs or standards I need to use before writing as spec sections.
 - 1. Master Specs:
 - a. LAUSD: We need to use their terrible master spec.
 - b. VA: Performance spec. If using brand name product, need to make sure client approve such usage.
 - c. Military: Performance spec. We need to use their master and software – Specsintact. Difficult software.
 - d. I do not do LAUSD, SDUSD, UCLA, UC San Barbara, UC San Diego, VA projects.
 - e. Default: AIA MasterSpec. Not perfect, but best in the business.
 - 2. Design Standards:
 - a. No master spec per se but list of materials to incorporate into design.
 - b. Drawings should reflect material section in the standards. Not something that is added to spec independently (similar to LEED projects).
 - c. Design standards are obsolete as they are printed and most often not wrong – get clarification from Owner before hand.

1.7 CONSTRUCTABILITY, AHJ, DSA, OSHPD, ETC COMMENTS

- A. This is when our real work begins – discrepancies between drawings and specs.
- B. QA/QC is designed to find discrepancies between drawings and specs. Once found, how do we deal with these comments?
 - 1. Drawings are in flux, design is constantly changing as we move from phases to phases.
 - 2. I can't make design decisions for you.
 - 3. Please review markups on specs. – For “architectural design” items, you need to tell me either:
 - a. Agreed – change as marked up.
 - b. Not agreed – leave as-is.
 - c. Sort of agreed – revise as such: text.
- C. Minor comments like typo, related sections, etc I can revise.
- D. Please forward spec comments to all consultants. Each consultants are responsible for their own spec sections.

- E. DSA comments: Upon your design direction, I will respond to “Architectural” DSA comments on “pdf” not on BlueBeam. “Architect” to interpret and respond on BlueBeam.

1.8 ADDENDUM

- A. Use of track changes vs narrative. Use one method, but not both.
- B. Strike out and bold text. (Avoid using underline, bold, italic, etc during regular spec bid set. They are reserved for Addendum)

1.9 PROJECT SCHEDULE

- A. Tentative schedule defined during proposal.
- B. Identify milestone submittals: 50% CD, 90% CD, 100% CD, backcheck, etc.
- C. One week prior alerts: I need to reschedule my plans accordingly.
- D. One day alerts: Identify missing sections from consultants.
- E. The day alerts: Email “compile” command. You are not waiting for me and I am not waiting for you. I never want to miss a deadline.

1.10 CONSULTANT MANAGEMENT

- A. Architect/Consultant Agreement: Should include 2004 CSI 3-part specification.
 - 1. Paid consultant vs free consultants.
 - a. I expect lot more from paid consultants.
 - 2. Format: Six digit section numbers. (
 - a. Converting from old 5 digit section numbers (1995 format): Quick and dirty method would be to add zero at end of section number; double check all cross references.
 - b. Related Sections: Do not list long list related sections. Only use if you must. Use sparingly. Best to delete all together. Major source of RFIs.
 - 3. Font: Times New Roman, 11 pt.
 - 4. File Naming convention:
 - a. Section number and section title. i.e. 072100 Building Insulation. (No space between section numbers 07 21 00) – DSA requires this and it’s a good thing.
 - b. Try to limit file name to 15 characters. Long file names are difficult to ZIP.
 - c. Do not modify district/owner “master” section names.
 - 5. Deliverables:
 - a. Individual spec sections in PDF. Zipped and include their Table of Contents.
 - b. Individual Arch specs in MS word for archiving purposes. They are for emergencies. Do not edit them. They will get out of synch.
 - c. Spec writer does not edit consultants’ specs. Consultants own their specs during pre-design, design, agency approval comments, constructability comments, value engineering comments, owner’s comments, bid, addendum, RFI, change order, etc.

- d. No specs: Need to know in advance which consultants will NOT be providing specs. (so we don't wait for them)
 - B. Types: Need to email all consultants project sample spec to follow.
 - 1. Major: Civil, Structural, MEP, landscape, LEED.
 - 2. Minor: Door hardware, audio, kitchen, elevator, waterproofing, etc.
 - 3. If any of the consultant's work is done by architect, you need to provide specs.
 - C. Project can go as fast as the slowest consultant.
 - D. Consultants spec should never be touched by anyone other than the consultant.
- 1.11 DOOR HARDWARE CONSULTANT
- A. Door Hardware consultants have 3 week waiting period. Please contact them early and get in line.
 - B. Siamese twins: Hardware Sets (HW) should never be separated from CSI 3-part specification.
- 1.12 INTERIOR DESIGNER
- A. Sometimes we have interior designers as consultants who may not provide 3-part specs. They just don't think in specs. However, they do understand cutsheets.
 - B. We may attach their cutsheets as an appendix at the end of spec book. It is a possible option as we get them late in the game or they are constantly changing or they are just not yet decided by client. Need to discuss. Another good candidate for appendix is kitchen equipment or appliances.
- 1.13 LEED CONSULTANT
- A. Four spec sections: (or something equivalent)
 - 1. 017419 Construction Waste Management
 - 2. 018113 Sustainable Design Requirements
 - 3. 018119 Indoor Air Quality Requirements
 - 4. 019113 General Commissioning Requirements
 - B. LEED score card.
 - C. LEED wording for each spec sections depending on LEED points pursued.
 - D. LEED is not an afterthought. Every aspect of Basis of Design product affects LEED. Make sure product selected meets LEED goals.
- 1.14 MOCK-UPS (this can be a separate topic for discussion)
- A. General rule: Building envelope - curtainwall, storefronts, windows, weather resistive barriers.
 - 1. They cost money.

2. If the components/systems are from architectural binder; such as Arcadia, Kawneer etc are already tested so we really don't needed tested. If we have custom curtainwall etc. we should have a mockup since they are not yet tested at the factory.
3. There is no ONE spec section for mockup. They are in different spec sections. Windows, curtainwalls, panels, doors, carpets, etc.
4. Elevation on drawings should indicate the components involved. Show as dotted line the extent of mockup. Need to decide if the mockup is part of the building or separate from the building.
5. What is the purpose of mockup? Water or air test or just for aesthetics. Different cost are associated for each.

1.15 BEST MODE OF COMMUNICATION

- A. Email: Paper trail. (Please do not ramble on and on over the phone. Do not shoot from the hip. I will forget).
 1. Subject Line: Project Number (if any), Project Name (short) - topic.
 2. Use screen shot.
 3. Use drawing sheet numbers.
 4. Use spec section numbers.
 5. Sound bite vs long list.

1.16 ELECTRONIC CUTSHEETS BINDER

- A. You should have office electronic cutsheets binder on your computer network. – shared by all team.
- B. Copy and paste pertinent cutsheets into the project. – Email to spec writer or upload to shared folder.

1.17 PROJECT COLABORATION

- A. BlueBeam: Email session ID.
- B. WeTransfer.com: Email up to 2 Gb of file size.
- C. Email link to weekly updates to Arch drawings in pdf if available.
- D. Create product binder. Email cutsheets to spec writer. Circle all options required. Treat it like a submittal from consultants. – Construction Administrator will love you.

1.18 PRODUCT REPRESENTATIVES (consultant but salesperson)

- A. List of reps: <http://www.byunpartners.com/documents/LArepFinder.pdf>
- B. Reps: Subject matter experts. (They know a great deal of their products)

- C. Spec Writer: A generalist (have to know little of everything), a documenter (not a designer), a lobbyist (influencer of products).
- D. Talk to them early and often. They will visit the site if they can, especially for re-roofing, door hardware upgrade, etc.)
- E. Once they become Basis of Design vendor, they will review any “substitution requests” and RFIs during construction administration. How great is that?
- F. Project require strict construction budget? Stay within the manufacturer’s product binder. Avoid “custom” or “design-build”.
- G. Bermuda Triangle: Do not get lost in the triangle.
 - 1. Project Manager – Architect.
 - 2. Product Rep.
 - 3. Spec Writer.
 - 4. Architect should push for 3-part spec upon review of project requirement with rep. Only then product rep can give you an edited spec. I can’t edit their standard spec for you because I don’t know the client’s requirements – you are the designer. I am here to document the project so contractor can understand the scope of work.
 - 5. Manufacturer’s Spec Wizard - "I'm not allowed to answer that question". I don’t know clients requirements.

1.19 SPEC FEE

- A. Project Management Plan (PMP) should include spec budget or at least a range already allocated. That way they don't waste people's time who want more fee and everyone is on the same basic page about what to expect.
- B. Market rate is always more expensive than what’s on the menu.
- C. Ideally, spec writer should be in “order taking” mode without need of fee proposal for repeat clients.

1.20 FEEDBACK LOOP

- A. Design should be constantly evolving.
- B. Construction Administrator should let us know:
 - 1. What is working, so we keep doing.
 - 2. What is not working, so we can fix it.

1.21 CHECKLIST METHOD –Deep dive (not discussed here, but can be).

- A. You can find the checklist at: <http://www.byunPartners.com/Documents/CheckList.pdf>
 - 1. Checklist is a great research tool; way better than Google.

- B. Find checklist “method explained” here:
<http://www.byunpartners.com/documents/checklistMethod.pdf>
- C. Summary: In-depth review of the Checklist with new PM is required. This can be done over the phone or Zoom call.
- D. Audience: Spec writer, project manager, principal in charge (optional), and design team member (optional).
- E. Duration: One hour. (Less if you have read the document (50 pages long); longer if you have NOT read the document prior to the meeting.

1.22 FEED BACK RECEIVED AFTER KICKOFF MEETING

B

A

i You replied to this message on 9/16/2019 2:35 PM.

Thanks to those who attended today’s session with David Byun on specifications.

Tips for better specifications:


1. The best specifications require nothing more and nothing less than exactly what we want for the specific project. We should not be guessing at what we want.
2. The project manager or project architect should be in charge of coordinating with the specifications writer for Division 1 and the Architectural sections.
3. We should have completed all interior and exterior material and color selections and gained client approval prior to making final decisions on the architectural spec sections. BCA’s Master Project Checklist by Phase lists Preliminary Materials and Color selections being completed in the SD Phase, with interior and exterior material and color selections completed by end of DD Phase. [Q:\BCA Guidelines and Procedures\Master Project Checklist By Phase.doc](#)
4. The project manager or project architect should carefully read each draft specification section to ensure they are correct for the specific project.
5. Read the submittal requirements listed in each section and verify that they are what we want.
6. Read the warranty requirements for each roofing related specification section and confirm they are what the client wants.
7. Confirm the basis of design manufacturer matches the product or system we depict in the plans.
8. Confirm the specifications information related to material finish matches what was approved by the client.
9. Review and coordinate the finish floor plan versus the related specification section. Best done at 100% CD and again just prior to back check.
10. Confirm any bid alternates or allowances listed in the plans are also listed in the related specifications sections and on the Division 0 bid form.
11. Request the Division 0 sections (aka contract requirements or contract documents) from the client in at the start of DD phase.

If you have questions, please ask me.

Regards,

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Chief Operating Officer

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