

SIMPLE Spec Writing

A system of templates
speeds production and
prevents misunderstandings

don't submit "proposals" to prospective clients; instead, I provide a detailed set of specifications. If I get the work, the clear, concise, easy-to-read specs become the guidelines for production of the job. For those jobs not administered by an architect, a system for producing detailed project specifications can greatly improve the efficiency, productivity, and client satisfaction of every project.

by Susan Cosentini

Why Write Specs?

A full set of specifications has advantages for both you and your clients.

Client education. The average homeowners are not familiar with the world of construction, so it's up to you to educate them. The more your clients understand about how the job will be put together, the easier it will be for them to communicate with you, and the more successful the job will be. The building business has become more about installing premanufactured components and providing good customer service than about producing jobs from scratch. Specs teach clients about the correct installation and use of the wide variety of building products on the market.

I've learned that when problems arise in the building process, the cause is usually a communication breakdown of some kind. Good specs make for good communication, and they are critical to the success of any construction business. I can't count the number of times my detailed specifications have helped resolve a potentially confrontational situation when we bargained to do one thing but the homeowner thought they were getting something else. Good specs identify exactly what I'm going to do. I almost never hear a client say, "Oh, I thought you were going to do that, too," which is usually where the problems start.

Better management. It's difficult to have a life and run a construction company at the same time. Good specs can help you get your life back by providing your crew with the information they need. I give my field employees a bound copy of the specs several weeks in advance of the start of work so they can become acquainted with them when they are relaxed and have time to absorb everything. I also mail, fax, or e-mail specs to subcontractors to estab-

Specification Categories

Site Preparation

demolish, remove and dispose
demolition surfaces
demolition structural

Excavation & Site Work

excavation and hauling
trenching
fill and haulage
site drainage
rough grading
finish grading
landscaping seeding and mulching

Concrete

concrete footings/slabs
concrete walls
concrete beams and stairs
concrete accessories
other concrete

Masonry

walls and foundations
fireplace and chimney
brickwork
stucco coatings
stone and earth work
other masonry

Metals / Ironwork

structural metal
metal joists and decking
ornamental metal work
other metals

Framing

sills and basements
beams and trusses
floor assemblies
exterior wall assemblies
interior wall assemblies
roof assemblies
ceiling/soffits
stair framing
framing repairs
decks
porches
garages
nails and framing hardware
other framing

Roofing

roofing materials
flashing
special roofing materials

Windows, Skylights & Exterior Doors

factory windows and doors; wood
factory windows and doors; metal
custom windows, custom doors
window repairs
hardware and screens
other windows, other doors

garage doors
skylights
skylight flashing
drywall return detail skylight

Siding, Soffits, Fascia & Exterior Trim

tyvek or typar
siding materials
other siding

Thermal & Moisture

insulation
foundation insulation
perimeter slab insulation
foundation water proofing
gutters and downspouts
vapor barrier
caulking and sealants

Wall & Ceiling Finishes

drywall
ceiling tiles and panels
textured finish
wall and ceiling repairs
other wall and ceiling

Interior Doors

factory prehung units
custom doors
locksets and deadbolts keyed alike
weatherstripping

Interior Trim

window trim
door trim
drywall returns on windows and doors
baseboard
interior shelving
interior stairs
wall and kneewall caps

Finishes / Painting

interior painting or staining
exterior painting
washing and scraping of windows

Cabinetry

kitchen cabinets
countertops
bath vanities and countertops
other cabinetry

Tile & Glass

ceramic wall tiles
floor tiles
specialty glass and blocks
other tile and glass

Specialties

intercom and security
mailboxes and directories
fire equipment
signs and graphics

bath accessories
signs and graphics
other specialties

Special Constructions

pools and ponds
sheds and barns
handicapped access
conveying systems
other special systems

Plumbing & Heating

utility hookups
supply and drain vent lines
plumbing fixtures
floor drain sump
sprinkler system
plumbing fixtures
hot water heater
boilers and radiators
inspections
other plumbing

Heating, Ventilating & Air Conditioning Systems

electrical
electrical demolition
utility hookups
boxes and wiring
switches and outlets
electrical fixtures
electrical fixtures
fans, smoke detectors
heating systems
other electrical

Appliances

kitchen appliances
range
oven
microwave
refrigerator
dishwasher
trash compactor
laundry appliance
other appliances

Flooring

wood flooring
vinyl
tile
carpet

General Conditions

permits and fees inspections
insurance
verification
warranties
time frame
change orders
utilities
trash removal
interim and final cleanup

Figure 1. Shown here are the major subheadings of the author's master template, which organizes her specs into phases that roughly follow the chronological order of construction. When visiting the site for the first time, the author uses a printed copy of the file — complete with a full text description of each phase of work — as a checklist and as a place to make notes that will later be incorporated into the job specifications.

lish, and later to coordinate, their scope of work. Good specs make for good relationships with field personnel, and they make it much easier to run multiple projects at the same time and still have some time left over for yourself.

More sales. A good sales presentation increases a client's comfort level. Detailed specs, professionally presented, say "quality" to your prospects and can be the deciding factor in which contractor gets the job. From the "study specs" I bring to the first meeting to the final documents, I give my prospects plenty to think about. My specs have won many bids because they convey the impression of a well-organized company.

Specs also help you justify your price. Once the clients understand everything that is involved in a complex renovation or custom home construction, they will better understand the way you have priced the work.

The Master Template

I arrange my specs on my computer according to a combination of AIA (American Institute of Architects) and CSI (Construction Specifications Institute) divisions and categories, along with my own additions and interpretations adapted to my business. You don't need fancy software — any word-processing program will do.

The master template headings and subheadings include all the detailed written specifications for each part of the job, starting with "site preparation," and roughly follow the order in which the actual work will be done (see Figure 1). Since the specifications are first used as a platform to generate my estimate, then later to direct the production of the job, it's important for the organizational scheme to mimic the actual work process.

Job-specific templates. In addition to the master template, I keep a folder called "Proposals" on my hard drive that contains examples of completed specifications for a variety of project types, such as "Addition," "Addition with Renovation," "Kitchens," "Baths,"

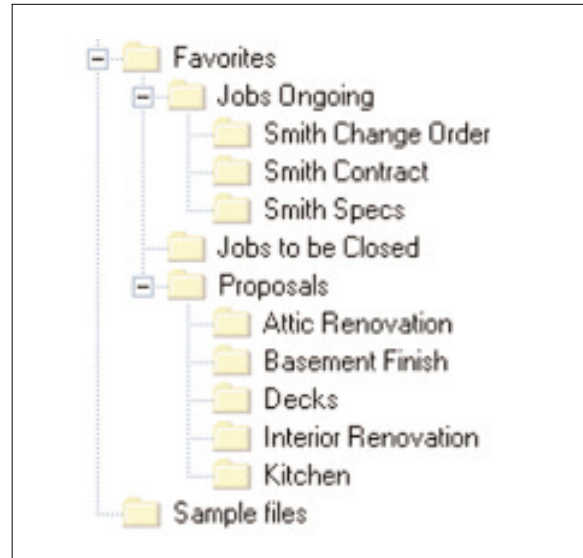
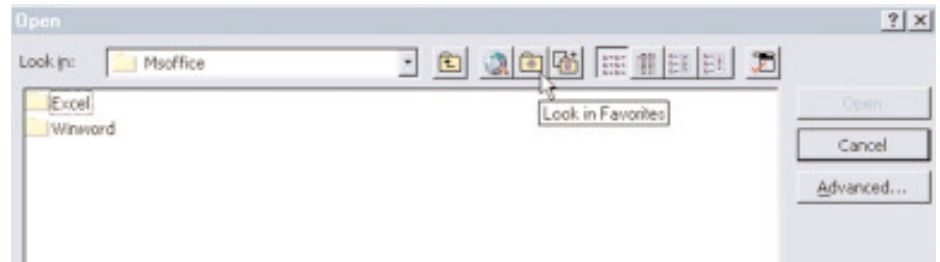


Figure 2. The author stores documents in the "Favorites" folder, which is on the directory bar in the MS Word *File | Open* dialogue box (above). In the hierarchy of sub-folders, current and pending jobs are stored in separate folders, followed by a "Proposals" folder, which holds completed specs from former jobs organized by type of work (left).

"Decks," and so on (Figure 2). Over the years, I've refined each of these job-specific templates so they can be used to quickly create specifications for new jobs. My clients may think it takes me a ton of time to create their specs, but 90% of the work is done before I start.

Taking notes. To begin creating specifications for a job, I print a paper copy of the master template with lots of space between the subheadings for notes. I take these "study specs" with me to my initial client meeting or job walk-through. As I look over the job and talk to the clients, I make notes in the appropriate categories and do some on-the-spot editing of the actual text. My long, well-organized printout gives me an edge over the competition and their yellow pads, because I not only appear better prepared, but I don't have to rely on handwritten notes for everything because the basics are printed in the specs. Instead, I can focus my notes on what makes this job *different*, which makes it much easier to remember the job later, even if a lot of time passes before I prepare the estimate.

Save As

When I finally get the time to write up the specifications, I fire up my word processor and create a new folder using the client's name as a title. This is where I will store all of the documents related to that job. Next, I go to my "Proposals" folder and open an existing file with specs that roughly match the new job. If I were about to write specs for a kitchen remodel, for instance, I would find an existing file for a kitchen where the scope of work was similar. Before I make any changes to this file, however, I use the *File | Save As* command to rename the file with the new customer's name.

At the top of every new spec document, I record the vital client information: names, mailing address, property address, referenced documents, and any other important information about the project. I'm careful to make this information block as complete as possible, because I "copy and paste" it to all of the other documents associated with the job, including informational mailings to subs and suppliers, contract documents, change orders, invoices, and so

Flooring

Wood flooring

See Drawings. Contractor shall provide and install new 2 1/4" red oak select flooring wherever indicated and as necessary to accommodate new floor plan. Existing flooring shall be retained wherever possible; however, if removal is necessary, replacement with new shall either be toothed into old for seamless finish or brought to an acceptable transition point. New flooring and affected areas shall be sanded and finished using a three-coat method, Lenmar polyurethane, no staining included. Basement floor shall be retained everywhere but in the kitchen and bath.

Vinyl

Basement kitchen and bath floors shall be removed if possible and new sheet vinyl flooring shall be applied over concrete slab. If existing parquet floor cannot be removed, an acceptable substrate for perimeter-glued vinyl shall be provided and a perimeter-glued floor shall be chosen for this application. Vinyl allowed at \$11/square yard.

Tile

None

Figure 3. Template headings and subheadings serve as prompts while preparing the specs. Excluded work is indicated with the word “none,” so there is no misunderstanding. Detailed specs are complete but concise, typically stating the particular materials and methods that will be used for that part of the work.

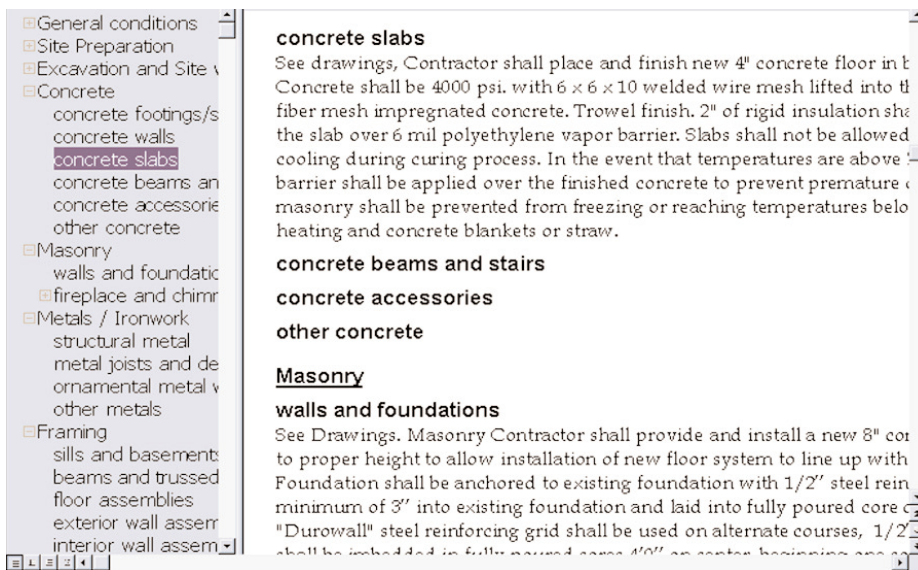
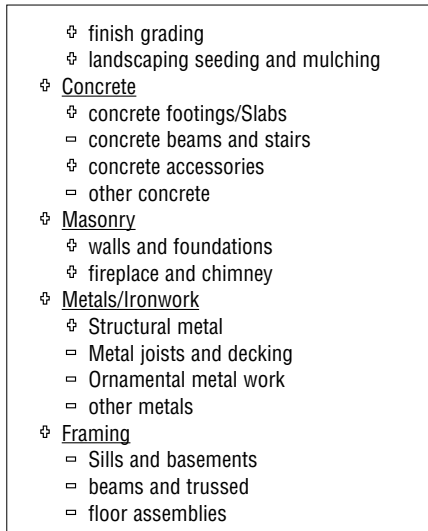


Figure 4. In older versions of MS Word, selecting “Outline” from the “View” menu produces a list of headings that can be expanded or collapsed using the plus and minus buttons on the toolbar (right). You can also navigate through the outline using the numbered buttons on the toolbar, which correspond to levels of indentation.

Newer versions of MS Word have a “Document Map” feature on the “View” menu. The “map” consists of an expandable outline that opens in a separate frame to the left of the regular text (above). Since the outline can be scrolled independently, it’s even easier to find the text you want, then cut and paste it into the specs.



on. Eventually, I hope to create a system where I can enter this information once and link it to the various documents, but for now my “copy and paste” technique works well.

With the marked-up walk-through printout in hand, I add to and change the computer version till it matches the current job. The advantage of using a previously saved document is that it already has a lot of the language and elements necessary for the new job. I simply delete lines that are not applicable and add new language from my notes. Also, the specs from a former job serve as a reminder and ensure that I include all the parts and pieces of the project. Not only is nothing overlooked, but if my specs vary from what other bidders are pricing, I can easily point out the differences to my clients.

By themselves, the headings and subheadings of the spec document help to present a “picture” of the job. If I’ve deleted a heading or subheading from the specs, there is no question that the work is not included: If it isn’t there, we’re not doing it. The specs contained within each subheading are detailed, but I try to keep them brief and to the point, simply stating the material and processes that I will use to build that part of the job (Figure 3).

Some phrases can be used over and over again. For example, the phrase “provide and install” indicates that I will be purchasing *and* installing the specified material: “Provide and install one Prop-R-Vent chute per rafter cavity to allow proper roof ventilation.” In other cases, however, I might install material purchased directly by the owner, so the spec might say: “Install Dining Room light fixture provided by owner.”

To keep the specs concise, I use phrases like “as necessary, in affected areas” to describe the scope of certain types of work. For instance, the spec “Replace insulation as necessary, in affected areas” indicates that I do not plan to retrofit insulation in the entire house — I am only agreeing to “replace” insulation in those areas that are affected by the remodeling work.

Outline View

In MS Word, the word processor I use, I can display my master templates as an outline, which is an option under the "View" menu (Figure 4). The outline enables me to "collapse" many lines of text into a comparatively short list, which can then be "expanded" by double-clicking to show detail. For instance, if I want to insert language describing concrete slabs into a document, I open my master document, then "expand" the Concrete subheading to display all the text. Once I locate the specific description I want, I copy and paste the language into the new specs.

Maintaining the System

The phrases I use in my specifications have come from a variety of sources. Some I have created over the years; others I have garnered from subs and suppliers. I also make use of manufacturer tech sheets, since I know my clients are going to expect me to know trivia I'd

just as soon forget. Instead of throwing product literature and cut sheets away, I take a few minutes each week to enter new information into my master specs. This small time investment pays off later when that information is at my fingertips while I prepare specs for a new project. It's a lot easier to find information about an obscure insulation system or a particular type of wire in your specification outline than to dig through piles of paper in your office.

Personalizing the Final Product

Over time, this spec-writing system has become so streamlined that I spend less time entering data and more time personalizing the end result to set myself apart from the competition. For example, I might insert a separate section detailing the special measures I plan to take to protect a cherished family heirloom, or I might include a section explaining details planned to accommodate a physically challenged

client. This not only ensures that the production crew doesn't omit these details, but it lets my clients know that I have their best interests at heart.

My specs are also the focal point of a three-ring binder I create for each client. I use custom-made tabs to index the various phases, and I include full-color cuts of the various products I will be installing, such as windows, doors, plumbing fixtures, and flooring.

I've invested a lot of time and effort developing and refining my system. I'm not interested in having the competition get it for free, which can easily happen if a prospect is sweet-talked into handing it over to a competitor's salesman. To prevent that from happening, I protect my documents with language about their exclusive use, and copyright infringement protection (see "Copyrights and Wrongs," 12/98).



Susan Cosentini is a builder and remodeler in Ithaca, N.Y.