

SPECIFICATIONS

Preliminary Project Descriptions

New importance and new uses for a familiar tool



Louis Medcalf, FCSI, CCS, is the senior quality director for Gresham Smith & Partners (Nashville, Tennessee), a large multi-discipline firm with offices in several states, where he manages the firm's specifications and quality assurance programs. Medcalf has been active in the Construction Specifications Institute (CSI) since joining in 1982 and has served on a number of national committees and received numerous local, regional, and national awards. He currently chairs the Task Team responsible for the new *PPDFormat* described in this article. Medcalf sits on *The Construction Specifier's* Editorial Advisory Board. He can be contacted via e-mail at louis_medcalf@gspnet.com.

In its *Manual of Practice (MOP)* and *Project Resource Manual (PRM)*, the Construction Specifications Institute (CSI) has long advocated preparation of Preliminary Project Descriptions (PPDs) for written documents accompanying Schematic Design drawings.

Schematic Design presentations are critical to reviewing and approving the proposed design and alternative solutions; they must provide clear information for the client to make informed decisions and to authorize proceeding to the next design phase. Since these drawings are not self-explanatory, other documents must be given to explain what is depicted.

Since cost-estimating is essential to verify proposed designs are within the client's budget, these written documents must contain sufficient information about materials, quality level, and factors affecting cost that cannot be shown graphically, such as sustainability goals.

The American Institute of Architects (AIA) and many of the engineering societies provide advice on the content of written documents for this design phase, but do not offer much guidance for organizing the documents.

UniFormat describes systems and assemblies (*i.e.* functional elements), rather than individual components as in outline and construction specifications organized with *MasterFormat*. Using this tool to organize the preliminary descriptions was a concept first developed by CSI and published in the 1989 edition of the *Manual of Practice*. At that time, *UniFormat* was not a familiar format for categorizing information about buildings; however, CSI recognized the potential of this method.

Firms that do not prepare PPDs usually assemble design narratives for each discipline late in Schematic Design phase, but there are no industry standards for formatting such documents. Since there is no universal checklist for design narratives, it can be difficult to verify

the information's completeness. In this respect, PPDs have numerous advantages, including:

- RS Means and other estimating systems use *UniFormat* organization for cost information for Schematic Design phase;
- *UniFormat* can be used as a checklist to ensure all project elements are included;
- organization has an intuitive sequence and is easily read by owners, lending institutions, and other laypersons who need to understand the proposed Schematic Design; and
- standardized presentation of complex information facilitates information preparation, retrieval, and use.

CSI's Technical Committee set up a task team in late 2008 to review recommendations in the *Project Resource Manual* and prepare a standalone publication called *PPDFormat*. This new document would have more detail, be coordinated with a revision of *UniFormat* taking place at the same time, and reflect recent industry developments. It has been through review and comment periods by both the public and Technical Committee, and should be published by early summer.

New importance for PPDs

Recent industry trends give new importance to the PPD concept because they heighten the need for understanding of a project during the Schematic Design phase. For one thing, project teams are finding it necessary to make more design decisions earlier. For another, there is a growing recognition of the benefit to having a steady flow of information that grows in parallel with the design's development, rather than just focusing on one-time-use deliverables to satisfy contractual obligations. Beyond producing a PPD as a Schematic Design phase deliverable, the general preliminary project description concept is a powerful tool for analyzing what decisions need to be made, and then recording and communicating those choices.