

# Chapter 4: Project Manual Guide

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### 4.1 GENERAL

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- A. The Project Manual: The Designer's requirements for preparation of a Project Manual are defined by the Agreement. This chapter provides the Owner's guidance for procedures and use of standard documents in developing the Project Manual.
- B. Standard Documents for Divisions 00 and 01: Use the Owner's standard documents for Division 00, Procurement and Contracting Requirements, and Division 01, General Requirements. These documents are provided in Appendix 3: Standard Bidding and Construction Documents. The Designer is responsible for accurate and appropriate application and editing of these standard specification sections.
- C. Technical References: The Owner encourages familiarity and use of the following technical references in the Designer's preparation of the Project Manual.
  1. The latest edition of the AIA Handbook of Professional Practice available from the American Institute of Architects.
  2. The latest edition of the CSI Manual of Practice available from the Construction Specifications Institute.

- D. Numbering System: Unless otherwise approved, prepare the Project Manual in accordance with the CSI MasterFormat 2004 numbering system.
- E. Paper Copy Format: Prepare paper copies of the Project Manual on 8.5 by 11 inch pages, printed two-sided, with each section beginning on a right-hand page, and bound in three-ring binders.
- F. Uniquely Prepared: Prepare the Project Manual for the unique requirements of the project. As standard documents or document templates are adopted for use in the Project Manual, the Designer shall ensure that provisions that are inapplicable to the project are removed, shall take care to remove unnecessary and redundant material, and shall make appropriate revisions to tailor concise, complete, and coordinated documents for the project.
- G. Promote Competition: The Owner requires that construction contracts are procured through procedures promoting competition to the greatest extent possible.

#### 4.2 STANDARD BIDDING AND CONSTRUCTION DOCUMENTS

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- A. Table of Documents: Table 1, Standard Bidding and Construction Documents, as exhibited in Appendix 3, lists the Owner's standard documents for Divisions 00 and 01 by number and title. Table 1 is not a Division 00 or 01 document.
- B. Instructions to Designers: **Follow the instructions and comments in Table 1 regarding the use of each document. Consult with the Owner for clarifications and exceptions.**
- C. Section 00 00 01 Project Title Page: Prepare the Project Title Page shall be in any style or format that maintains consistency with the following guidance. A Project Title Page is not required if the cover of the Project Manual provides the prescribed content. If the cover does not also serve as the Project Title Page the cover shall at a minimum include the project title.

1. Example format and content:

**PROJECT MANUAL**

August 15, 2010

For the Project Titled:

Classroom Building

University of Tennessee Health Science Center

Memphis, Tennessee

SBC No. 540/XX-YY-ZZ

OWNER:

The University of Tennessee

DESIGNER:

A2Z Design, Inc.

123 Main Street, Mytown, TN 35555

Phone: (615) 123-4567, Fax: (615) 123-4568

2. Designer's Seal and Signature: The Designer's seal and signature is to be affixed to only the cover and/or title page that provides the prescribed content, or a specific Seals Page which shall be titled such and numbered 00 01 07. The Designer's seal and signature are required by statute (T.C.A. Section 62-2-306(b)).

3. Optional Contents: Additional graphics and information such as names of consulting engineers are acceptable on the cover and/or Title Page, provided the content requirements stated above are met.
- D. Section 00 01 10 Table of Contents: Provide a Table of Contents for the entire Project Manual which shall not be referred to as an index. Providing a table of contents for each Division at its beginning is discouraged as redundant.
- E. Section 00 01 15 List of Drawings: Provide a List of Drawings that differentiates between those bound within the Project Manual and those bound as separate companion volume(s). Drawings bound within the Project Manual shall be placed after the specifications.
- F. Section 00 01 20 List of Schedules: Provide a List of Schedules which identifies each schedule name and location in the Drawings, Project Manual, or separate companion volume(s).
- G. Section 00 11 16 Invitation to Bid: Use the completed document provided by the Owner.
- H. Section 00 41 13 Bid Form:
  1. On the Bid Form in the Project Manual show the Bidder Name as "PROJECT MANUAL EXAMPLE". On the Bid Form provided as a part of the Bid Pack delete text to allow the Bidder Name to be inserted.
  2. Complete the information for the Project Title and SBC Number on all pages.
  3. Complete the information for the amount of the Three Year Roof Bond as described below.
    - a. If the project includes installation of a low-slope ("flat") roof a Three Year Roof Bond shall be required and a proposed amount shall be reviewed with the Owner and upon approval stipulated on the Bid Form. Examples of appropriate stipulations are "An amount equal to the Base Bid", "An amount equal to Alternate No. 1", or "An amount equal to XX% of the Base Bid", or an actual dollar figure, deriving the percentage or amount from the Designer's estimate for the roof work.
    - b. If the project does not include installation of a low-slope roof, confirm with the Owner that a Three Year Roof Bond is not required and upon approval stipulate "Roof Bond Not Required" on the Bid Form.
  4. Complete the information for the Contract Time after review and approval by the Owner, with information added as applicable for Phases. Coordinate information on Phases with Section 00 11 00 Summary. Follow the definition of Contract Time in the General Conditions, counting days from and including the Notice to Proceed date and the date required for Substantial Completion. For example, a project with a Notice to Proceed date of June 2, 2010, and three days of Contract Time would require achievement of Substantial Completion on June 4, 2010.
  5. Complete the information for Liquidated Damages after approval by the Owner.
  6. Revise the text for identifying Alternates 1 through 3 to show for each the name of the Alternate or "Not Applicable". Ensure consistency with Section 01 23 00 Alternates. Use of Alternates requires Owner review and approval.

7. Revise the text for identifying Unit Prices to show the number of Unit Price Items (shown as “XX” on the blank form) or “Not Applicable” if no Unit Prices will be used in bidding. If Unit Prices are used complete the table to show the information for “Item No.”, “Unit”, and “Name/Work Included”. Ensure consistency with Section 01 22 13 Unit Prices. Use of Unit Prices requires Owner review and approval.
- I. Section 00 61 43 Three Year Roof Bond: Reference the preceding guidance regarding the Three Year Roof Bond and include this Section as applicable.
  - J. Section 00 72 13 General Conditions: The electronic version of this Section is provided by the Owner in .pdf format which includes an unsigned Certification of Document’s Authenticity as the last page of the .pdf file. The Owner will provide a signed Certification upon request. Include the Certification in the Project Manual after the Section.
  - K. Section 01 11 00 Summary: Consult with the Owner for specific project information and submit a draft Section 01 11 00 Summary for Owner approval. Use the following guidance to prepare the Summary.
    1. Insert text describing in one paragraph the Base Bid Work.
    2. Insert text describing any Work sequence required or “NA”.
    3. Insert text in the table to describe any required Phasing of the Work or “NA” in the top left box of the table.
    4. Insert text describing any work by others or “NA”.
    5. Edit text to indicate whether the Owner “intends” or “does not intend” to use a Construction Scheduling Consultant.
    6. Edit text to indicate whether the Owner “intends” or “does not intend” to use a Commissioning Agent.
    7. Insert text to describe each aspect of special work restrictions or “No special restrictions”.
    8. Insert text (in two places) to describe provision and payment of water and electric power required for construction activities.
  - L. Section 01 78 36 Roofing System Warranty: Unless otherwise agreed to by the Owner, use this section if the project includes installation of a roof and develop the roofing technical specifications to meet the following requirements.
    1. Prohibit any other warranty form.
    2. Prohibit incorporation or attachment of any other warranty, stipulations, or qualifications.
    3. If applicable, require separate warranties for each building, roof, or type of roofing membrane.
    4. Require a warranty term of twenty years unless otherwise directed by the Owner.
    5. Require inclusion of applicable roofing system components by exact naming of each component.

- M. Section 01 81 13 Sustainable Design Requirements: Edit this section to comply with the results of the Sustainable Design Process described in Chapter 3. Indicate “Yes” or “No” where shown and mark appropriate check boxes. With the Owner’s approval a substitute section may be used for projects with additional sustainable design requirements related to U.S. Green Building Council’s Leadership in Energy & Environmental Design (LEED) program.

#### 4.3 SPECIFICATIONS

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- A. Trade Assignments Not Allowed: Do not assign work to trades in the specifications or otherwise stipulate construction means, methods, and techniques. Specifications may establish qualifications for those performing a specific task.
- B. Avoid Proprietary Specifications:
  1. When specific manufacturers are named, the naming of a specific manufacturer should serve only to establish a level of quality. Specifications should not be made proprietary unless there is sufficient justification, which must be well documented and specifically approved by the Owner. When proprietary specifications are justified and approved by the Owner the specification shall clearly state that no substitution is acceptable for that product.
  2. Use performance, descriptive, or reference standard specifications to the greatest extent possible. If a manufacturer's name is used to establish a level of quality, include the names of at least two acceptable products.
  3. The Owner will permit the substitution of products of equal or better quality subject to Designer approval in accordance with Section 01 60 00 Product Requirements. Substitution requests before receipt of bids shall be in accordance with Section 00 21 13 Instructions to Bidders.
- C. Avoid Redundancy: Augment, but do not repeat provisions stipulated elsewhere in the Contract Documents.

END OF CHAPTER