

General Notes vs. Other Contract Documents

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In a previous *Keynotes* article¹, general notes were briefly discussed including the observation that general notes frequently include content that is more appropriately, and probably is, indicated elsewhere. However, design professionals seem to embrace the mantra that mentioning it once is good, but mentioning it twice (or more) is even better.

The problem with mentioning a requirement more than once is the potential conflict between the various requirement locations. The CSI principle of “say it once and in the right place” arose out of frequent conflicts between drawings, specifications, and other contract documents, and many of these conflicts are generated through the improper use of notes on drawings.

As mentioned in the earlier article, there are three types of general notes that can be used in a set of construction drawings. Listed below is each type along with the description found in the *Uniform Drawing System* (UDS), which is a part of the *National CAD Standard* (NCS):

- **General Notes:** “Notes that apply to the entire work. As such, general notes apply equally to all disciplines and to all sheets within the drawing set.”
- **General [Discipline] Notes:** “Notes that apply only to a particular design discipline. Users should provide a heading for these notes by replacing the [discipline] place holder with the name of the particular design discipline.”
- **General Sheet Notes:** “Notes that apply only to the particular sheet on which they appear.”

General Notes

As described in the UDS, basic *general notes* provide information that is applicable to all sheets for all disciplines. Therefore, architects (who are, in most cases, the prime design professional) need to make sure that the basic general notes included in the construction documents are applicable to all disciplines. If they apply

only to the architectural sheets, then they should be identified as such per the second type of general notes.

Take a look at most ‘General Notes’ on a set of construction drawings and you will notice that in many cases the notes are many and sometimes lengthy. If architects were to spend a little time to actually read the ‘general’ notes they always place on the drawings, they will likely find that one of the three following characteristics will apply to most of them:

1. The intent of the note is already addressed in the general conditions of the contract;
2. The intent of the note is already addressed in Division 01 of the specifications; or,
3. The note is only applicable to the architectural sheets.

For example, consider the following note, which, in some variation, is commonly found in many ‘General Notes’:

Discrepancies between actual condition and drawings shall be brought to the attention of the Architect. Contractor shall submit specific discrepancies for Architect review.

Characteristic #1 would apply to this example since the general conditions will usually address this situation. For projects using the American Institute of Architects (AIA) Document A201-2007, *General Conditions of the Contract for Construction*, Section 3.2.2 covers the same requirement (see portion with added underline) as in the general note above, but includes more specific direction for the contractor:

Because the Contract Documents are complementary, the Contractor shall, before starting each portion of the Work, carefully study and compare the various Contract Documents relative to that portion of the Work, as well as the information furnished by the Owner pursuant to Section 2.2.3, shall take field measurements of any existing conditions related to that portion of the Work, and shall observe any conditions at the site affecting it. These obligations are for the purpose of facilitating coordination and construction by the Contractor and are not for the purpose of discovering errors, omissions, or inconsistencies in the Contract Documents; however, the Contractor shall promptly report to the Architect any errors, inconsistencies or omissions discovered by or made known to the Contractor as a request for information in such form as the Architect may require. It

¹ [Keynotes No. 3](#), “Drawing Notations,” Spring 2010.

is recognized that the Contractor's review is made in the Contractor's capacity as a contractor and not as a licensed design professional, unless otherwise specifically provided in the Contract Documents.

If the project does not use AIA Document A201, the architect should review the general conditions that will be used for similar language. If no similar requirement is in the general conditions, then a *general note* on the drawings, like the example, or a requirement in specification Section 01 73 00 "Execution," would suffice. However, the requirement should be revised to include the method in which the contractor should inform the architect, such as AIA Document G716 *Request for Information* form, CSI Form 13.2A *Request for Interpretation*, or some other approved form or electronic method.

General notes that paraphrase requirements provided elsewhere (e.g. the general conditions or specifications) may generate various interpretations. Altered wording used in a *general note* to simplify it may be interpreted differently than the more specific wording used in another contract document. Even though the intent may have been to replicate a requirement, the paraphrased format of the *general note* itself could create a conflict.

Another common *general note* is one similar to the following:

All work shall be performed with the highest level of workmanship standards of the building trades working under this contract.

The first question that should come to anyone's mind after reading the note above should be, "How will it be enforced?" This overarching requirement is akin to requiring design professionals to perform to the *highest level of care*—something professional liability insurers will refuse to insure. Characteristic #2 would apply to this note, so leave it out and let the specifications establish the minimum level of workmanship through the use of tolerances and reference standards.²

Finally, as an example of characteristic #3, take a look at this 'general' note:

All studs and any other framing are at 24" o.c. minimum unless noted otherwise.

With the possible exception of the structural drawings, the above note is only applicable to the architectur-

al drawings. *General notes* that are specific to a discipline, should be separated from the basic general notes and located with the discipline sheets to which they apply. Thus, the example note should be placed with the 'General Architectural Notes.'

General [Discipline] Notes

General [Discipline] Notes, as the format implies, is to identify general notes that are specific to a particular discipline—with the bracketed 'Discipline' being replaced with the applicable discipline, such as Architectural, Structural, Mechanical, Electrical, etc. Although the UDS provides a format for titling the general notes for disciplines, very few disciplines actually follow it. Most disciplines will use the title 'General Notes' and place them on the first sheet of their drawings, assuming that readers of the drawings will make the connection. The rare exception is the structural engineering profession, which seems to have universally adopted the format (more on this later).

These notes suffer some of the same afflictions that basic *general notes* do—primarily Characteristics #1 and #2. *General discipline notes* also display another affliction that is specific to this type of note: they frequently address the subcontractor/tradesperson.

An example of this problem is illustrated in the following actual note used on the first sheet of mechanical drawings in a set of construction drawings:

The mechanical contractor shall be familiar with all contract documents for all trades and shall coordinate with other contractors.

The problem with the above note is that it specifically addresses the "mechanical contractor." For single-prime contracts, and depending on the project delivery method, the drawings are part of the contract between the owner and *general* contractor—not the mechanical contractor (who is actually a subcontractor). There is no contract between the owner and a subcontractor. As a matter of fact, AIA Document A201 specifically addresses this in Section 1.1.2 (underline added):

...The Contract Documents shall not be construed to create a contractual relationship of any kind (1) between the Contractor and the Architect or the Architect's consultants, (2) between the Owner and a Subcontractor or a Sub-subcontractor, (3) between the Owner and the Architect or the Architect's consult-

² Read more about this type of note in the [07/18/11 post of specsandcodes – the blog](#).

ants or (4) between any persons or entities other than the Owner and the Contractor...

Therefore, all requirements, whether placed on the drawings, in the specifications, or elsewhere, should be directed to *the* contractor on the project.

Another issue with the example discipline note is the direction given to the mechanical contractor to “coordinate with other contractors.” Under a single-prime contract, the general contractor is given the responsibility for coordination—typically in Section 01 31 00 “Project Management and Coordination” of the specifications. Thus, that portion of the note can be stricken based on Characteristic #2. But wait, there is more...

The example discipline note can also fall under Characteristic #1 based on the statement that the mechanical contractor “be familiar with all contract documents.” This is basic requirement that is already expressly stated in AIA Document A201 in Section 3.2.2 quoted earlier.

One area where *general discipline notes* have been taken to the extreme is in the structural engineering field. General Structural Notes, or GSN’s as they are commonly referred to, are included with such great detail that they border on the edge of specifications (actually, they have probably crossed that line). Structural engineers have defended the practice by stating that the information is required by the building code. That is partially true.

Section 1603.1 of the 2012 *International Building Code* (IBC) requires that the construction documents indicate “design loads and other information pertinent to the structural design required by Sections 1603.1.1 through 1603.1.9.” However, the sections identified by the IBC only require that live loads (floor and roof), snow loads, wind loads, seismic data, geotechnical information, flood data, special loads, and items requiring special inspection be shown on the construction documents. Nowhere does it mention that material and installation requirements be shown. The specifications are a more appropriate location for these requirements.

General Sheet Notes

General sheet notes are not to be confused with the keynotes used on the sheet—they are simply a general note that applies to the sheet on which it is placed. General sheet notes typically do not apply to a single item on

the sheet, but provide written explanatory information for interpreting the graphic information shown on the sheet.

The same general sheet note may appear on multiple sheets of the same type. For example, the following general sheet note may be repeated on all applicable floor plan sheets:

All dimensions are to face of stud unless noted otherwise.

Or the following note may appear on all reflected ceiling plans:

Ceiling heights shown are 9’-0” unless noted otherwise.

However, if a note is used on every architectural sheet because it is applicable to every sheet (Characteristic #3), then the note should be mentioned only once at the beginning of the architectural sheets as a *general discipline note*. The *general sheet notes*, like the other notes discussed, can also find themselves replicating other requirements per Characteristics #1 and #2, so they should be reviewed to prevent duplicating or conflicting information.

Conclusion

General notes are important for proper interpretation of the construction drawings, but like many things, more does not always mean better. General notes used on drawings should be carefully selected and written so as not to duplicate, paraphrase, or contradict other contract documents.

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