

GUIDE TO DEVELOPING SPECIFICATIONS

A specification is any type of description that completely describes the item desired. The most important objective of a procurement specification is to provide a basis for obtaining a product or service that will:

1. satisfy a particular need,
2. at an economical cost,
3. at minimum acceptable standards, and
4. provide the basis for comparing offers.

Although Contracts & Procurement has the responsibility for the competitiveness and suitability of purchase specifications, it does not initiate or prepare all specifications because the expertise related to exact needs typically resides in the requesting agency. The goal of Contracts and Procurement is to partner with the Agency to obtain quality products and services at the best value and within the parameters of applicable laws, rules and regulations. Clear specifications are very important to the success of the process. Poor specifications cause unnecessary delays and may result in an inappropriate purchase, a protest or necessitate a rebid.

The most common cause for delays in the procurement of goods and/or services is due to the incomplete presentation of specifications. Thorough and complete descriptions will assist with an effective and efficient procurement process.

Tips for Developing Specifications:

- Include a brief description of the product and its end use. Specifications should contain enough detail for the bidders to understand the Agency's requirements.
- Describe the item fully or reference an approved brand name to assist in describing the item's intended use, functional capabilities and levels of performance. If specifications indicate the desired brand and model, invite competitive brands by indicating "or equal" unless a proprietary brand has been pre-approved by Contracts and Procurement.
- Description of the item should be written without the use of confusing abbreviations or acronyms.
- List all standards used and referenced within the specification such as American National Standards Institute (ANSI), State of Utah specifications, etc.
- Specify dimensions, class or type, color size, material, quality level, etc. including functional or performance characteristics.
- Specifications should be for the minimum requirements, not options that would be nice, but not really needed.
- Eliminate mandatory requirements if not important to the function of the purchase.

- Technical equipment specifications should contain enough detail to differentiate the level of quality or performance required.
- If sizes are part of the specifications, determine if a range is acceptable (indicate minimums and maximums), or indicate approximates. If the item must fit into a given space, indicate the available space.
- If weight is an important factor, indicate the acceptable range or minimum or maximum acceptable weight.
- If developing specifications from a brochure, select the most important features required for your need. Leave out brochure language that cannot be objectively evaluated.
- Delivery, warranty, or training requirements should be clearly defined.
- Identify any instructional materials or service manuals that the Bidder must furnish. Also, incorporate into the specifications the type of training they must provide to the end users.
- When compatibility with an existing piece of equipment is a factor, describe the equipment, connectors, interfaces, brand and model of the existing equipment.
- If the Agency desires to purchase a model like one they already have, verify that the model and brand number is still available.
- Specifications should clearly state packaging requirements, size, types of finish, color coordination, etc.
- If installation is required, provide details on what is expected of the Bidder.
- When specifying maintenance, define the extent of service, parts, labor, service hours requirement, minimum number of preventative maintenance inspections, and any other inclusions or exclusions. Specifications should avoid using restrictive language such as “vendor must be located with a 20 mile radius of Salt Lake County.” Request a reasonable response time instead.
- Performance specifications are less interested in how a product is made and more interested in how it performs. The tests or criteria to evaluate a product’s ability to perform and to endure as required should be included as performance indicators. Example; “must pull a 2000 pound trailer.”
- For a services solicitation, you could require the bidder to state what performance indicators the County can hold them to.
- On long, technical specifications, you may want to include a requirements list with a yes/no column to invite bidders compliance response to assist in the evaluation process.
- Understand the use of the following words:
 - *Shall* denotes the imperative
 - *May* denotes the permissive

- *Should* denotes desirable
 - *And* means it must have both or multiples
 - *Or* means either is acceptable
- Remember – you cannot evaluate a bid on criteria that is not part of the solicitation.

Specification Checklist

1. Size – dimensions, weight, volume, shape, etc.;
2. Composition – material (plastic, aluminum, steel, etc.), chemical formulation, strength, color, finish, weight;
3. Estimated requirements/historical data;
4. Quantity and packaging (52 packages per carton or 12 bottles per case);
5. Provide a satisfactory make, model, and part number, if known. List all necessary features and do not list unnecessary ones. This information will be used to determine “equal” makes, models and part numbers;
6. Drawings or photographs, when useful;
7. Purpose – briefly describe the intended use(s) of the item. For instance, mention the make and model of equipment when buying a supply item for that equipment (bearings for a XYZ 60hp motor, Model 123A). Mention other significant factors such as 24-hour, 7-day per week usage and anything else that may be unique to your use of the item;
8. Performance / Quality assurance – state the conditions under which the product will be inspected and/or tested: sampling, function, weight, measure, etc.;
9. Bidder’s submittal requirements;
10. Appropriate reference specifications, codes, and standards;
11. Delivery requirements – how is product to be shipped or delivered; will it require installation and start-up;
12. Execution, start up, and installation requirements;
13. Security/facility considerations;
14. Warranties – what type of warranty is required; and
15. Other special terms and conditions.