

Preparing Specifications and/or a Scope of Work

The following information is intended to aid departments in preparing adequate specifications and/or a scope of work for a solicitation. This information pertains to Requests for Quotes, Invitations for Bids, and Requests for Proposals.

1.01. PREPARING SPECIFICATIONS

A. Specifications

A specification is a description of the physical or functional characteristics of a good, service, or construction item. It is a description of what the purchaser seeks to buy, and to which a bidder/offeror must be responsive in order to be considered for award of a contract. The more clear and precise the specifications are, the less time will be needed to respond to prospective bidder's/offeror's questions, the more compliant the responses will be, and the fewer complaints and protests there will be. Specifications have a great impact on the price. Whether the specification is open or restrictive directly affects the extent of competition.

- i. Poorly written specifications:
 1. Deter potential bidders/offerors.
 2. Increase costs.
 3. Decrease the chance of desired results.
 4. Are easily misinterpreted.
 5. Are open to challenge and protest by unsuccessful bidders/offerors.
 6. Increases risk.
- ii. Well-written, complete, clear, concise, specific criteria and specifications:
 1. Attract many qualified offerors.
 2. Are easier to evaluate.
 3. Minimizes the possibility of protests.
 4. Lower risks.
 5. Lower costs.

B. Types of Specifications:

- i. Design Specifications:

Design specifications establish the material and operating requirements of goods. These types of specifications often have precise requirements that limit competition, prevent consideration of the latest technological improvements, and discourage innovation.
- ii. Performance Specifications:

Performance specifications describe what a good is expected to do. There is less concern about the material composition of the good and the way it is manufactured or assembled, and more concern about its performance when put into use. The bidder/offeror is not directed to act in a certain way but is given an

opportunity to use ingenuity and to innovate in order to provide a good which will perform a specific task.

- iii. Combination Specifications:
A single type of specification cannot always adequately describe the need. Sometimes, the design-performance combination will be the best approach, with the design requirements kept to a minimum and the performance characteristics more detailed.

C. A good specification should be:

- i. Consistent.
- ii. Easy to read and understand.
- iii. Easy to revise, if needed.
- iv. Formatted with good direction.
- v. Organized and categorized.
- vi. Concise and free of repetition.

D. When preparing specifications, consider:

- i. Who will receive the document?
- ii. What do I want people to know or do?
- iii. How detailed and exact should my information be?
- iv. What questions might they ask?

E. Choosing words and phrases:

Words or phrases to avoid:

consumption
circumvented
nevertheless
activate
cooperation
erroneous
initiate
compensation
exemplifies
expedite
conglomeration
disseminate
incinerate
prioritize
modification
necessitate
a great number of times
in most cases
experience has shown
a small number of
it is recommended that

Preferred words or phrases:

use
avoided
but
start
help/aid
false
start
pay
show
rush
mixture
spread
burn
rank
change
require
often
usually
experience shows
few
we recommend

with respect to	concerning
make contact with	meet
at a later point in time	later
in consideration of the fact that	because
at your earliest convenience	soon
at regular intervals	regularly
in the normal course of	normally

- F. Vague references, such as “prepared to our satisfaction” or “in a timely manner,” are not acceptable. The language should be free from ambiguity and redundancy.
- G. Specifications that are optional should be clearly noted as optional.

1.02. PREPARING A SCOPE OF WORK

A scope of work is important because it forms the foundation of any resulting contract for services. The elements of a scope of work vary greatly with what is being procured. It may or may not incorporate a specification.

- A. A good scope of work should:
 - i. Be a clear, concise, and complete description of the work to be performed.
 - ii. Make a clear-cut division of responsibility between the College and the bidder/offeror.
 - iii. Not exceed the actual need.
 - iv. Not be unduly restrictive.
 - v. Be stated in terms that the market can satisfy.
- B. Items that may be included in a scope of work:
 - i. Background.
 - ii. Objective.
 - iii. Contractor’s tasks.
 - iv. Performance and/or design specifications
 - v. References to related studies, documentation, specifications, and standards.
 - vi. Data requirements.
 - vii. College’s and contractor’s furnished property, facilities, equipment, and services.