

Specification Writing



OFFICE OF STATE PROCUREMENT

Objectives

- Importance of compliance with Revised Statutes
- Definition & Purpose of a well prepared Specification
- State's Policies
- Different Types of Specifications
- Basic writing principles and characteristics of a good Specification
- Information Agency Should Include on a Shopping Cart



Revised Statutes & LAC

- Revised Statute 39:1651 – 1657
- Louisiana Administrative Code 34:V Ch. 1 & 3

Specification preparation, maintenance, content, different types, and other matters related to specifications are governed by Part IV of the Louisiana Procurement Code as found in Revised Statute 39:1651 and Chapters 1 & 3 of the Rules and Regulations as found in the Louisiana Administrative Code Title 34.



State's Policies

- To promote overall economy
- To encourage maximum competition
- To describe requirements without being unduly restrictive
- To procure commercially standard products, avoiding unique requirements



Definition of a Specification

“Specification” means any description of the physical, functional, or performance characteristics of an item, OR the nature of a supply, a service, construction job, or a major repair.

- It may include a description of any necessary requirements for inspecting, testing, or preparing a supply, service, or major repair for delivery to your agency.



Purpose of a Specification

To serve as a basis for obtaining products or services that are suitable for the state's needs, in a cost effective manner.

“The best product or service at the best price.”

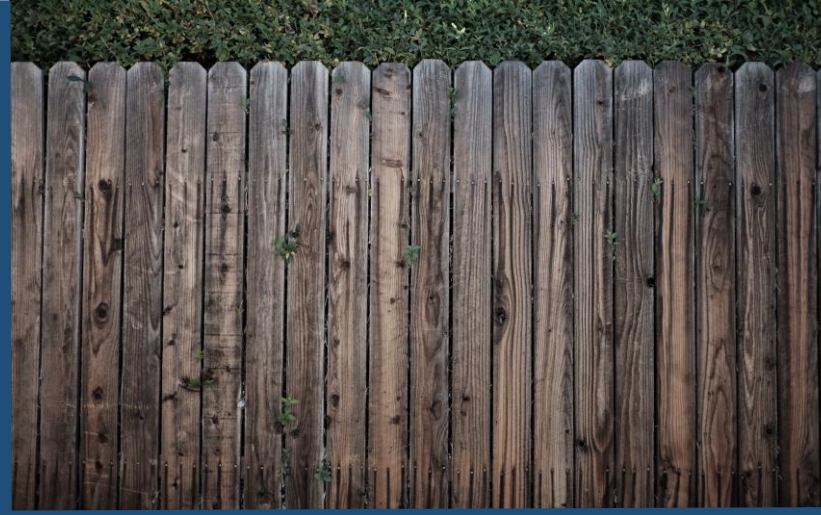


Everyone Develops Specs

- What size pizza do you want?
- What kind of crust?
- What kind of sauce?
- What toppings?
- Any additions / deletions or "extra" amounts of ingredients?
- Dine-in, takeout, or delivery?
- Any additional side-items such as bread sticks, wings, drinks, or dessert?



Example - Fencing



Example – Trash Cans



Competitive vs. Closed Specs

- **Competitive:** more than one brand can meet the specifications
- gives the best opportunity to receive lower pricing based on competition among vendors.
- **Closed:** only one brand can be bid, but it is available from multiple distributors. Provides some competition, but restricts the number of bidders and therefore can lead to higher prices.

Note - Closed specifications are known as “proprietary” and you must provide justification as to why only this brand/model will meet your needs.



Proprietary Specifications



Maintainability

Standardization



Compatibility



Importance of a Clear Specification

Eliminates protests that delay procurement

Helps bidders understand your requirements

Bids cannot be evaluated on criteria that is not included in the specification



Characteristics of a Good Specification

- Simple
- Clear
- Accurate
- Competitive
- Flexible
- Measurable & Verifiable



Good Spec / Bad Spec



- Streamlines the process
- Enables bidders to understand what is being requested
- Encourages competition



- Causes delays
- Vendor Questions/Addenda
- Protest
- Rebid



Useful Tools

- Partnership- Purchasing/End User
- Research
- Past History/Experience
- Vendors' Expertise
- Pre-Bid Conference
- Period of Inquiry
- Addenda



Types of Specifications

- **Generic**

- Describe physical characteristics, function, and/or performance desired
- No brand referenced
- Examples of Use:
 - Services
 - Custom Printing
 - Food

- **Competitive with Brand Name, or Equal**

- Brand Name & Model Numbers represent quality and performance desired
- Must include desired specifications – not just brand & model no
- Cannot evaluate bid on criteria not listed in specifications
- Most frequently used type of specification



Other Types of Specifications

- Proprietary Specifications
- Sole Source
- Qualified Products List or Approved Brand List
- Common or General Use Item
- Functional or Performance Spec



Spec-Writing Tips

- When it comes to measurements, try to list ranges instead of exact dimensions, if possible
- Don't list requirements if they are not necessary
- Don't copy brochure marketing language
- Include any special requirements the vendor must provide, such as installation, training, warranty, etc.
- List any special delivery requirements
- If you are having equipment installed, construction work done, or an on-site service provided, you should always request that vendors do a site-visit prior to submitting a bid



Spec-Writing Tips

- Work with the end user to develop specifications
- Provide enough detail so the bidder understands the requirements
- Describe requirements generically rather than brand specific, when possible
- If the specification is for maintenance, identify the frequency and extent of required service
- Indicate packaging requirements & be open to alternates
- Requesting samples
- Specifications should be competitive



Spec-Writing Tips

Understanding the meaning of these words:

- **“Shall”** or **“Must”** means it is imperative.
- **“May”** means it is permissive.
- **“Should”** means it is desirable.
- **“And”** means it must have both.
- **“Or”** means either is acceptable.



Info to Include on a Shopping Cart

- Item or Service Description
- Correct Commodity Code
- Suggested Vendors
- Correct Unit of Measure
- Estimated Cost
- Exact or Estimated Quantities
- Special Delivery Requirements



Info to Include on a Shopping Cart

- Special Packaging Requirements
- Award Formula (Grouped, All-or-None)
- Site Visit Information (if required)
- Any licenses or certifications needed
- Any other special requirements or T&C's



It's a Balancing Act.....

AGENCIES:

It's not the right size!

It doesn't have all the features we need!

It doesn't match what we use now!

It won't get here in time!



VENDORS:

Only this brand can meet those specs!

I can't bid at all.

I could bid a lot lower if the specs weren't so restrictive.

I want to protest these specs!



Specifications:

The Key Elements to a Successful Purchase

The key to success throughout the Procurement Cycle is through teamwork between agencies and OSP, so that the state receives the correct, necessary goods and services in a prompt, efficient manner while getting the best value for its dollar.



Questions?



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