Writing Specifications for Results

April 2017

Joyce Auld, CPPB, GCPA, GCPM
Procurement Training Specialist
Objectives

• Definition and Purpose Specifications
• How to Get Started Writing Specifications
• Types of Specifications Used in State of Georgia
• Resources Available
• Content
• Managing Risk Potential
• Determining Effectiveness
Definition and Purpose
Definition of Specifications

• A precise description of the physical or functional characteristics of a product, good or construction item
• A description of what the purchaser seeks to buy (bidder must be responsive in order to be considered for award of contract)
• Includes contract terms and conditions
Purpose of Specifications

- Used to compare offers of products or services to stated requirements
- Should not restrict competition
- Serves as the heart of the competitive sourcing selection process
- Critical statement of what the government seeks to meet its needs
Exercise
Exercise

• Partners will sit back to back of each other
• Partner A will describe to Partner B the object/process in the picture (without saying what the item is)
• Partner B will write a description of the item being describe to them
• After all 3 items are described, partners will match description to picture
How to Get Started
How to Get Started

- Review or research similar solicitations
  - think outside the box
  - look at other states for suggestions
- Identify who should be involved in the preparation
- Strive for brevity when applicable
- Identify acceptable level of performance
- Focus on completeness, consistence, and correctness
Types of Specifications
Types of Specifications Used in GA

<table>
<thead>
<tr>
<th>Performance</th>
<th>Design</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sole Brand</td>
<td>Sole Source</td>
</tr>
<tr>
<td>Brand or Trade Name</td>
<td>Qualified Product List (QPL)</td>
</tr>
</tbody>
</table>

Identifying the type of specification to use, depends on the commodity, its characteristics, and what is needed.
Performance Specifications

A description of a product or service that provides a general functional recital of performance characteristics required to achieve an end result or outcome desired.
Design Specifications

• A specification that establishes the characteristics an item must possess, including detail indicating how it is to be manufactured
• Details physical characteristics, appearance, connectivity, size, weight, etc.
• Often restrict competition or are proprietary
• Frequently used in contracting for the construction of infrastructure projects and highly technical or specialized projects
Sole Brand Specifications

- Identify by name, model number or other details or designations, a specific product manufactured by a specific manufacturer
- Simplifies the responsibility of procurement professional
- Reduces competition
- Commonly used when buying replacement parts for equipment and standardization
Sole Source Specifications

- A unique item or service available from only one supplier
- Commonly used when a supplier is a patent holder
- Obtained through non-competitive bidding
- Requires strong justification and research
  - Compatibility
  - Existing Contract
  - Uniqueness
Qualified Product List (QPL) Specifications

- A list of items or services that have been examined and tested, and have satisfied all applicable qualification requirements
- Restricts bidders to those product/services on the list
- Tends to limit competition to only those pre-approved products/services for that particular bid
Brand or Trade Name Specifications

- Use of one or more manufacturers’ brand name with identifying model number to describe the standards of quality, performance and other characteristics needed to meet the requirements of the solicitation
- Invites bids for equivalent products from any manufacture
- End-user reserves the right to determine equivalency
Resources Available
Resources Available

• Georgia Procurement Registry (https://ssl.doas.state.ga.us/PRSapp/PR_login.jsp)
• National Institute of Government Purchasing (http://www.nigp.org/)
• Other States (naspo.org)
• Professional Societies
Contents

• Background and context
• Scope of Work
• Target Groups
• Delivery timelines
• Payment terms and incentives
• Risk Identification and responsible party
• Performance measures
• Progress Reporting
• Contact Person
Manage Risk Potential
Manage Risk Potential

- Consider:
  - Future Probability
  - Probability or likelihood
  - Consequence
- Key Activities:
  - Reduction (treat)
  - Removal
  - Transfer
  - Retention
  - Share
- Consider Need for Bonds and/or Insurance
Determining Effectiveness
Determining Effectiveness

- Step back, request different set of eyes to review
- Consider flexibility options
- Assess competitiveness
- Consider current:
  - Market
  - Design
  - Manufacturing
Determining Effectiveness

• Outcomes – what are you trying to achieve
• Outputs – what are the measurable services or activities the supplier must deliver to achieve outcome
• Inputs – details of how to meet outcome
Determining Effectiveness

- Are there loopholes
- Can the capabilities be verified
- Are tolerances reasonable
- Can requirements be met by multiple suppliers
- Is language used concise and understandable
- Are mandatory requirements included
- Have system, design, and staffing needs/support been addressed
- Reporting requirement
The Genesis of a Specification

In the beginning is the **Need**, and the **Need** is without form, and void. The purchasing agent and the end user, working in close cooperation, **define that need and create a description of the physical or functional characteristics of a product or service to meet the need** – thus is born a **specification** in its simplest form.
Citations

- State of Idaho. Division of Purchasing. Guidelines for Writing Effective Specifications, August 2010
- Department of Administrative Services State Purchasing. Writing Specifications, June 2005
- Risk Management Guide for DOD Acquisitions, August 2006
- Effective Specification Writing, Dr. J. Gordon Murray