

CHAPTER 7

SPECIFICATIONS

7-1 DEFINITION

The term "specification" refers to that portion of a solicitation that describes the characteristics of a commodity or service required by a using agency. It is used interchangeably with the terms, "purchase description," "purchase specification," "purchase requirement," "commercial item description," "scope of work" and "statement of work." A specification may include requirements for samples, prototypes, inspection, testing, warranty and packaging. The specification portion of a solicitation should not contain bidding instructions, contractual terms and conditions, pricing formats or similar materials.

7-2 AUTHORITY FOR SPECIFICATIONS

The District gives the Purchasing Agent the authority and responsibility for specifications. Since the purpose of a specification is to translate a user's need into the delivery of goods or services, the development of specifications must be a cooperative effort between the using agency and Purchasing. However, prior to release of a specification, as part of a solicitation, the Purchasing Agent must be satisfied that it will result in a fair and equitable competitive purchasing.

7-3 TYPES OF SPECIFICATIONS

There are several types of specifications. The development, selection and use of a particular type is dependent on the situation, time, information available and needs of the user.

A. **PERFORMANCE SPECIFICATIONS:** Performance specifications (also known as Functional Specifications) are preferred since they communicate what a product is to do, rather than how it is to be built. Among the ingredients of a performance specification would be the following:

- A general nomenclature or description;
- Required performance characteristics (minimum/maximum) to include speed, storage, production capacity, usage, ability to perform a specific function;
- Operational requirements, such as limitations on environment, water or air cooling, electrical requirements;
- Site preparation requirements for which the contractor will be responsible, such as electricity, plumbing, or for which the District will be responsible;
- Compatibility requirements with existing equipment or programs;
- Conversion requirements for maintaining current equipment or system until switching to the new equipment or system;

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- ♦ Installation requirements;
- ♦ Delivery date;
- ♦ Maintenance requirements;
- ♦ Supplies and parts requirements;
- ♦ Quantity and method of pricing;
- ♦ Training Requirements;
- ♦ Warranty; and
- ♦ Service location and response time.

B. **DESIGN SPECIFICATIONS:** Design specifications employ dimensional and other physical requirements and concentrate on how a product is fabricated, rather than on what it should do. Design specifications are normally prepared by architects and engineers for construction or custom manufactured products. Among the ingredients of a design specification would be the following:

- ♦ Dimensions, tolerances and specific manufacturing or construction processes;
- ♦ References to a manufacturer's brand name or model number; and
- ♦ Use of drawings and other detailed instructions to describe the product.

C. **BRAND NAME OR EQUAL:** When a specification mentions a manufacturer's brand name or model number, it should also include the words "or equal." In this regard, "or equal" is interpreted to mean, "*substantially equal and capable of performing the essential functions of the referenced brand name or model.*" Identify in the requisition any specific features of the referenced brand that must be met.

D. **SCOPE OF WORK FOR SERVICES:** The following is an outline of the types of information that should be included in a scope of work for purchase of professional or other services:

1. **General Requirements.** Describe the vendor's responsibility to provide a service or product, a specific study, design or report for the using school/department.
2. **Specific Requirements.** Address the specific tasks, sub-tasks, parameters and limitations which must be considered in producing the service or final project. Such factors as the following should be included:
 - ♦ Details of work environment;
 - ♦ Minimum or desired qualifications;

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- Amount of service needed;
 - Location of service;
 - Definition of service unit;
 - Time limitations;
 - Requirements for sub-contractors including the use of District certified Small Business Enterprises;
 - Travel regulations or restrictions;
 - Special equipment required; and
 - Other factors affecting working environment.
3. District Provided Materials or Services. List any plans, reports, statistics, space, personnel, or other District provided items that must be used by the contractor.
 4. Deliverables, Reports and Delivery Dates. Identify the specific delivery dates for all documentation or other products the contractor must furnish. Be clear about the expectations of the District for the contractor's performance.

7-4 SPECIFICATIONS DO'S AND DON'TS

A. DO'S

- Be specific and detailed in presenting mandatory requirements in providing projects, goods or services, i.e., licensing, drawings, blueprints, bonding requirements and insurance.
- State a requirement of fact once and avoid duplication.

B. DON'TS

- Present something as mandatory if it is really optional;
- Write specifications or scope of work that restrict response to a single bidder/offer or; and
- Place bid/proposal administrative or contractual terms in the specification portion of the document.

7-5 PREPARATION AND REVIEW OF SPECIFICATIONS

Schools/Departments are responsible for the first draft of specifications to be submitted to Purchasing. Lengthy and complex specifications may be submitted to the Purchasing Department by email in Microsoft Word. After Purchasing has reviewed the specifications and writes the special and standard terms and conditions, the School/Department will be forwarded a draft for review and sign off.