

Creating an Effective Scope

Introduction

Specifications are one of the most important elements of the purchasing process. The preparation of clear specifications is one of the most difficult functions in the process. Inadequately or poorly written specifications are the cause of many challenges and can considerably delay the purchasing process. This information is designed to define specifications and assist Rowan University (RU) personnel by providing guidelines to good specification writing.

It is the responsibility of the department to provide RU's Office of Contracting & Procurement (OC&P) with full and complete specifications for the products or services requested. Clearly written and properly organized specifications, establish technical goals, administrative and financial expectations, and set the tone for good communication and a productive relationship between the University and the supplier/contractor. To accomplish this the specifications must clearly define the user's need. Included with your bid request should be any applicable pictures, diagrams, and/or illustrations as well as a list of potential bidders (include company name and email address) you would like to directly solicit.

OC&P has the final responsibility for specifications issued as part of a formal IFB/RFP. The specification may originate within a RU department; however, OC&P will review the specifications for suitability and competitiveness. The OC&P is responsible for conserving public funds and providing the most advantageous products and/or services for the University as a whole.

Definition of Bid Specification

The term "specification" refers to a description of the characteristics of a commodity or service required or desired. Specifically, it is defined as the explicit requirements furnished with a solicitation upon which a purchase order or contract is to be based.

State Requirements & Bid Specifications

Bid specifications must be written to encourage fair and open competition. A state entity can seldom dictate the exact characteristics of the desired product causing difficulty in the preparation of specifications. Because of bidding regulations, it is difficult to justify the purchase of specific or name brand product. Furthermore, specifications are public record; serving to keep purchasing open by allowing the public to see exactly what is being purchased.

How to Develop Specifications

Specifications by their nature, set limits, thereby eliminating or restricting items that are outside of the parameters. Specifications should be written to encourage, *not discourage*, robust bidding remaining consistent with the state's mission of fair and open competition.

A good specification should do these things:

- Identify minimum requirements.

- Allow for a competitive bid.
- Provide for an equitable award at the lowest possible cost.

To provide a common basis for bidding, specifications should set out the essential characteristics of the item being purchased, so that all bidders know exactly what is wanted. If an essential requirement is left out of the specification, an award may be made for a product that does not meet the needs of the purchaser. The suitability of the product may not become apparent until much later. Situations such as these are seldom resolved to anyone's satisfaction. If such an omission is discovered in time, the bid should be canceled, specifications corrected, and new bids solicited. Avoid over-specifying or underspecifying. Items should be able to perform as necessary without unessential frills. Requiring unnecessary features can result in specifications so restrictive that they can defeat competition and increase the cost of the item. Remember that all purchasing activities are subject to public and vendor scrutiny. If a specification allows both an equal opportunity to bid and objectivity of selection by the bidder, then the specification is serving its intent. A straightforward and fair evaluation based on good specifications will persuade vendors to bid.

Suggested Boilerplate

The following information is presented as a basic outline for specifications.

Sections may be added or deleted as required by the product specification being developed.

- 1. Introduction:** To the University, the specific department, and how they relate to the bid.
- 2. Scope, Classification, or Description** The first words or lines of a specification should be a general description, classification, or scope of the product desired and the intended or desired use of the item.
- 3. List of Requirements:** These requirements should identify measurable physical, functional, and quality characteristics that meet the requirements. This may include a detailed list of characteristics, such as: sizes, physical dimensions, weights, percent and type of ingredients, types and grades of materials, standard of workmanship, or basic design. The text should be clear, simple language, free of vague terms or those subject to variation in interpretation. The use of abbreviations should be restricted to those in common usage and not subject to possible misunderstanding.

Checking Your Specifications

To assure that your specifications meet the above criteria, use the following checklist:

- Specifications should be clear and accurate, yet simple. They should NOT be so specific that a loophole eliminates competition and allows a bidder to take advantage of the purchaser.
- Specifications should be understandable to both the bidder and the purchaser.
- Specifications should be as flexible as possible. Inflexible specifications defeat the competitive bid process.
- Specifications should be legible and concise.

- Specifications should be capable of being checked. Specifications that are written in such a way that a product or service offered cannot be checked as meeting specifications is of little value and results in confusion.
- Specifications should be as fair to the bidder as possible and allow for competitive bidding by several bidders

Specification Sources

There are many available sources online that can be of assistance when developing specifications. Below are just a few suggestions for gathering specification information:

- Collect as much information as possible regarding functionality and performance of the requested product or service.
- Lean on colleagues who have made similar purchases. Use their expertise and knowledge.
- Collect product information from the industry (brochures, catalogs, specs, etc.). Many manufacturers list their catalogs and product specifications on the internet.
- Look for standards and test information from professional societies where available.
- Reach out to OC&P for assistance

If you have any questions, please reach out to the [Office of Contracting and Procurement](#).