

GUIDE TO DEVELOPING SPECIFICATIONS

A specification is any type of description that completely describes the item desired. The most important objective of a purchase specification is to provide a basis for obtaining a product or service that will:

1. satisfy a particular need,
2. at an economical cost,
3. at minimum acceptable standards, and
4. provide the basis for comparing offers.

Although the Purchasing Division has the responsibility for the competitiveness and suitability of purchase specifications, it does not initiate or prepare all specifications because expertise related to exact needs typically resides in the department. The development of specifications should be a joint effort with Purchasing and the requesting department.

The most common cause for delays in the procurement of goods and/or services is due to the incomplete presentation of specifications. Thorough and complete descriptions will assist with the procurement cycle.

Tips to Developing Specifications:

- Include a brief description of the commodity and its end use.
- Describe the commodity fully or reference an approved brand name (check with Purchasing).
- Description of the item should be written without the use of confusing abbreviations or acronyms.
- List all standards used and referenced within the specification such as American National Standards Institute (ANSI), State of California specifications, etc.
- Specify dimensions, class or type, color size, material, quality level, etc. including functional or performance characteristics.
- Define supplier deliverables and the District's responsibilities (if any).

Specification Checklist

1. Size – dimensions, weight, volume, shape, etc.;

2. Composition – material (plastic, aluminum, steel, etc.), chemical formulation, strength, color, finish, weight;
3. Estimated requirements/historical data;
4. Quantity and packaging (52 packages per carton or 12 bottles per case);
5. Provide a satisfactory make, model, and part number, if known. List all necessary features and do not list unnecessary ones. This information will be used to determine “equal” makes, models and part numbers;
6. Drawings or photographs, when useful;
7. Purpose – briefly describe the intended use(s) of the item. For instance, mention the make and model of equipment when buying a supply item for that equipment (bearings for a XYZ 60hp motor, Model 123A). Mention other significant factors such as 24-hour, 7-day per week usage and anything else that may be unique to your use of the item;
8. Performance – electrical, mechanical, chemical, etc.;
9. Bidder’s submittal requirements;
10. Appropriate reference specifications, codes, and standards;
11. Execution, start up, and installation requirements;
12. Quality assurance – state the conditions under which the commodity will be inspected and/or tested: sampling, function, weight, measure, etc.;
13. Delivery requirements – how is commodity to be shipped or delivered; will it require installation and start-up;
14. Security/facility considerations;
15. Warranties – what type of warranty is required; and
16. Other special terms and conditions.