

Writing Better Specifications

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Agenda

- Developing Specifications
 - Importance of Market Research
- Writing Specifications
 - General Guidelines
 - Let's be Journalists!
- Exercise (*Time Permitting*)



Purpose of Specifications

1

Define what you want to buy & what the supplier is required to provide

2

Identify essential characteristics, proper quality

3

Assure maximum, reasonable competition

4

Reflect programmatic and functional needs





Developing Specifications

- You may be the voice, but not the subject matter expert
 - Identify appropriate resources to participate in specification development
- It's all in the preparation
 - Conduct market research
 - Amount of research needed will vary from project to project based on factors such as amount of risk, known history and projected spend



Market Research



Market Research Sources

Internal Resources

- Other existing contracts
- Questions/issues raised during a prior contract
- Existing metrics (such as performance, time study)
- Future projections based on trends

External Resources

- Internet news
- Other state or federal solicitations
- National organizations, publications
- Government databases (e.g., CPI, PPI)



Importance of Market Research

- Market Research will help you:
 - Identify opportunities and risks
 - Establish a viable list of potential bidders
 - Understand pricing and cost drivers
 - Learn how the market works and which direction the market is heading





Importance of Market Research

- Using Market Research to develop specifications will:
 - Ensure your specifications align with industry standards
 - Help control costs
 - Mitigate risk
 - Increase competition
 - Increase likelihood of a successful outcome

Now it's time to put all that research into action!



Writing Specifications



Writing Specifications: General Guidelines

- Be specific – don't use terms that are open to interpretation
- Separate multiple concepts into individual requirements
- Use “must,” “shall,” or “may” appropriately to convey intent
- Be consistent – don't use different terms that mean the same thing (e.g., vendor and contractor, provider and bidder)
- Keep mandatory (non-negotiable) requirements and negotiable terms separate



Writing Specifications: Questions to Consider

- **Who** needs the product or service?
- **Why** do they need it?
- **What** product or service do they need?
- **When** do they need it?
- **Where** will it be used?
- **How** will it be used?





The “Who”

Internal & External Stakeholders

Potential Issues:

- Missed stakeholder needs
- Assumes certain level of vendor knowledge and capability
- Does not align with current industry standards
- Specs can only be met by a single supplier





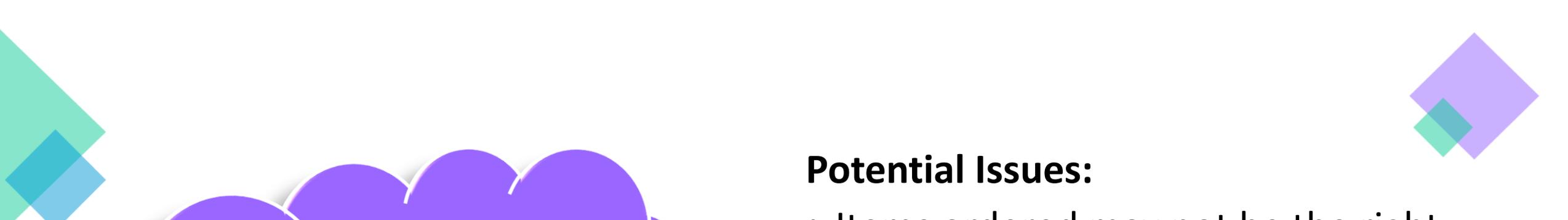
The “What”

Using requirements to explain your needs

Potential Issues:

- Specifications are not quantifiable or measurable
 - Not enough detail to understand
 - Outdated, not adjusted for market
 - Warranty is unclear/not defined
 - Unit of measurement (UOM) is not appropriate for what is being purchased
- 





The “Where/When/Why”

Start → Finish

Potential Issues:

- Items ordered may not be the right size for their application
- No information on “how” results in poor coordination of delivery, installation, other on-site services
- Not enough details for vendor to perform
- Assumes certain services (e.g., disposal) or supporting materials (e.g., manuals) are included



The “How”

*Business needs versus
desirables*

Potential Issues:

- Mixing mandatory and optional specifications in the same section
- Copying vendor website or materials and assume they represent industry standards
- Specs (e.g., min, max) are too restrictive without business reason
- Expressing a requirement as mandatory that doesn't need to be



Testing





Testing...

- Are they simple, yet specific to avoid misinterpretation?
- Are they clear and concise?
- Are they measurable?
 - Examples of words that are not specific or measurable: sufficient, substantial, majority, timely, reasonable
- Can specs be met by several bidders?





Testing in Action: Request for Information



- Responses can be used to develop and/or validate specifications
- Gather information on possible vendor pool
- Better understanding of:
 - How well specifications align with market
 - Potential costs



Testing in Action: Draft Solicitations

- Posting draft solicitations for comment/feedback can:
 - Identify specifications that need to be revised
 - Not enough detail
 - Too restrictive
- Reduce number of questions asked during solicitation
- Decrease likelihood for protest



Specification Writing Exercise





Exercise Instructions

- We'll review a specification that includes some of the issues we've discussed today
- Using the Live Q and A feature, answer the following questions:
 - What issues need to be addressed in this specification (i.e. Who, What, Where/When/Why, How)?
 - What ideas do you have for how this requirement could be improved?
- We'll provide a fully revised version of specification #3 to demonstrate how this exercise can improve the quality of your specifications



Example: Specification #1

“Contractor must have access to replacement parts within 45 minutes to service all machines listed.”

Questions for Live Q and A:

- What issues need to be addressed in this specification (i.e. Who, What, Where/When/Why, How)?
- What ideas do you have for how this requirement could be improved?





Review: Specification #1

“Contractor must have access to replacement parts within 45 minutes to service all machines listed.”

Issue Type	Issue	Recommendations
What	Not enough detail provided to understand requirement	Refer to the section of the machines listed for better clarity.
Why	Possibly too restrictive maximum time required (45 minutes)	Understand the business reason behind why 45 minutes is required. Could a longer time be allowed?



Example: Specification #2

“It is expected that the contractor have adequate staff and equipment to process forty (40) sites per day. (This number is subject to change based on mutual experience in the field.)”

Questions for Live Q and A:

- What issues need to be addressed in this specification (i.e. Who, What, Where/When/Why, How)?
- What ideas do you have for how this requirement could be improved?





Review: Specification #2

“It is expected that the contractor have adequate staff and equipment to process forty (40) sites per day. (This number is subject to change based on mutual experience in the field.)”

Issue Type	Issue	Recommendations
Who	Assumes some vendor knowledge	Better define when the number of sites may change. Unsure what “mutual experience in the field” means.
Where/When/Why	Not enough details needed to perform	The sites locations should be better defined. Statewide? Within a region?
General Writing	Use of terms open to interpretation	Define the acceptable quantity of staff rather than say adequate.



Example: Specification #3

“For normal maintenance, the contractor shall have a list of three people who are available 24 hours a day. The list shall have the entire phone numbers needed to reach them and a cell phone number for each person. The contractor shall have no less than (6) persons available for set-up during the event and shall have sufficient personnel for tear down. The Department will determine the exact amount of labor.”

Questions for Live Q and A:

- What issues need to be addressed in this specification (i.e. Who, What, Where/When/Why, How)?
- What ideas do you have for how this requirement could be improved?





Review: Specification #3

“For normal maintenance, the contractor shall have a list of three people who are available 24 hours a day. The list shall have the entire phone numbers needed to reach them and a cell phone number for each person. The contractor shall have no less than (6) persons available for set-up during the event and shall have sufficient personnel for tear down. The Department will determine the exact amount of labor.”

Issue Type	Issue	Recommendations
General Writing	Too many concepts within one specification	Separate the requirements.
General Writing	Use of terms open to interpretation	Define the acceptable quantity of staff rather than say sufficient.
What	Not enough detail to understand	Give the reason the agency is determining the amount of labor





Revised Spec #3: Focus on Outcomes

Section 1.1: Maintenance Service

1.1.1 The Contractor shall provide (preventative; corrective/reparative; both) maintenance to all equipment listed in section NUMBER and have the ability to respond to maintenance calls 24 hours a day (seven/five days per week).

1.1.2 The Contractor shall provide the department with a then-current list of all maintenance personnel available for 24-hour calls that includes, at a minimum, a name and phone number.





Revised Spec #3: Focus on Standards

Section 1.2: Event Management

1.2.1 For all events, the department will provide the Contractor with at least NUMBER of days' notice to request event set-up services. Upon such notification, Contractor must provide at least six (6) persons to set up the event in accordance with a pre-determined punch-out checklist.

1.2.2 Contractor must provide staff to tear down events within 1 hour of notification from the department and in accordance with a pre-determined punch-out checklist.



Questions?

Thank You!

