

**SPECIFICATION WRITING  
FOR BUSY PUBLIC  
ADMINISTRATORS**

*Dr. Clifford  
McCue*

# YOUR INSTRUCTOR!



Really, it is me.....



# TRAINING PURPOSE

The purpose of this training is to show participants how to properly develop specifications for the purchase of goods, services and works.

Cover the basic mechanics of writing a specification that **promotes competition**.

# BEFORE WE BEGIN

Please note that some of the material presented herein has been adopted or adapted from various sources. Since this is solely for educational purposes, direct citation is not mandatory for today's presentation. However, if you plan on using some of the information presented herein, please make sure to properly cite.



# THE POWER OF...

To obtain the best price, the greatest power we have is the power of...

**competition**

# THE POWER OF...

To obtain the best quality, value, and/or service,  
the greatest power we have is the power of a...

**well written specification**



Better make sure that you follow the right specification process, or you may be the one holding the sign!

# WHAT IS A SPECIFICATION

A specification by any other name is still a specification

# ACCORDING TO MCCUE

In a procurement context, a specification is a statement of a need. It defines what the buyer wants to buy and, consequently, what the offeror/supplier is required to provide.

Specifications can be simple or complex depending on the need.

The success of the procurement activity relies on the specification being a true and accurate statement of the buyer's requirements.

Apart from being a means of identifying the goods or services required, a specification will form part of any future contract that might result from offers received.



# SEVEN RIGHTS OF SPECIFICATIONS

Right  
materials or  
services

Right  
quantity

Right time

Right place

Right source

Right service

Right price

# A GOOD SPECIFICATION SHOULD INCLUDE

A clear, concise, and logical statement of the requirement in functional and/or performance terms.

Specifications must contain enough information for offerors to decide to submit and provide enough information for offerors to identify their costs of the goods or services that their performance will be evaluated against.

# A GOOD SPECIFICATION SHOULD

State the criteria for acceptance of goods, services, or works by examination, trial, test **to provide equal opportunity for all potential offerors/suppliers to offer goods, services, or works which satisfies the identified criteria.**

Form the fundamental basis of the contract between buyer and seller.

Not over-specify requirements

**Not contain features that directly or indirectly discriminate against competitors**

## AND IT SHOULD **EXCLUDE**

Bidding instructions, contractual terms and conditions, delivery, pricing formats or sheets, or similar material which should be specified separately in the Invitation to Bid or the Request for Proposals.

# CONSEQUENCES OF BAD SPECIFICATIONS

You end up getting something that you did not want.

You have a lot of change orders

You waste a lot of money and time

You aggravate the supplier

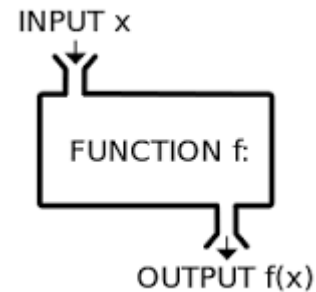
You end up in court

You have to redo the bid/proposal

Your boss gets upset

# TYPES OF SPECIFICATIONS

- Functional Specifications



- Performance Specifications



- Technical Specifications



# FUNCTIONAL SPECIFICATIONS

These are specifications that define the **function, duty or role** of the goods, services, or works. It identifies what the offeror is broadly required to do.

Functional specifications define the task or desired result by focusing on what is to be achieved rather than how it is to be done. They do not describe the method of achieving the intended result.

# PERFORMANCE SPECIFICATIONS

These are specifications that **define the purpose** of the goods or services in terms of how effectively it will perform, that is, in terms of capability or performance, and do not describe the method of achieving the desired result.



# TECHNICAL SPECIFICATIONS

These are specifications that define the **technical and physical characteristics and/or measurements of a product**, such as physical aspects (for example, dimensions, color, surface finish), design details, material properties, energy requirements, processes, maintenance requirements and operational requirements.

They are used when functional and performance characteristics are insufficient to define the requirement.

# HOW TO WRITE A GOOD SPECIFICATION

Create a level playing field – remember the power of competition

Establish a comprehensive picture of what needs to be considered.

Ask yourself, “What are the most crucial factors?”

Realize that you are creating a specification of what you **need**, not what you **want**.

# HOW TO WRITE A GOOD SPECIFICATION

Do effective research

What is needed? What is *really* needed?

Be curious and ask good questions – where, what, when, why, how, and who?

Make sure to use words that do not eliminate potential suppliers.

If needed, go and see...or invite the vendor community...or do good market research.....

# HOW TO WRITE A GOOD SPECIFICATION

Guide the supplier to what you want

Allow the supplier to get what they want

Show respect by the way you write:

- Correct grammar and punctuation
- Be Explicit
- Use short sentences and simple language
- Use the same terminology throughout
- Avoid redundancies; contradictions

# THINK WIN-WIN

- The way you present the specification will have a major impact on those who will offer, the savings you will obtain, and service you will receive.

“Short words are good.

Short words well understood are best.”

Winston Churchill



# THINK WIN-WIN

The department is responsible for the initial draft.

Purchasing will usually have questions and will typically make suggestions for fine tuning specifications.

The department and purchasing will collaborate as a team to create the final draft.

Don't forget about Legal.....man do they do a good job of vetting the solicitation.

# WRITING SPECIFICATIONS



# WRITING HINTS

**Writing Style:** Exposition is concerned primarily with the communication of ideas in a form that the reader can understand. It aims to: Save the readers time, eliminate confusion, and help the reader gain ideas quickly and easily.

**Active Voice is Preferred:** Active voice is the most simple and direct way to make statements. Action is expressed directly, more vigorously, and makes the sentence more concise. Readers prefer the active voice because it is more: Direct, interesting and descriptive.

**Choosing the Right Word:** You can make your meaning more clear by using shorter words. Shorter, more direct words get to the point, are clear-cut, and distinctive. For example: activate, expedite, initiate, nevertheless, prioritize and erroneous.

**Write Clear Using Shorter Phrases:** Do not use long phrases when it is not necessary. For example: a great number of times (many), at regular intervals(every), make contact with(call).



# SPECIFICATION RESOURCES

Suppliers and manufacturers

Colleagues and governmental sources

Professional associations

- The NIGP
  - Purchissues
  - Library

Online resources

Call a Friend

ChatGPT

# CHAT GPT

AI has a lot of potential to help in writing certain types of specifications. But please do not let it be the only one you use.

## **REQUEST FOR PROPOSAL (RFP)**

### **AWNING REPLACEMENT AND/OR REPAIR SERVICES**

**We are inviting qualified contractors to submit competitive bids for providing awning replacement and/or repair services for the City located in [insert location]. The awning replacement and/or repair services will include:**

- **Assessment of the existing awnings for repair and/or replacement requirements.**
- **Provision of a detailed report outlining the required repairs and/or replacement.**
- **Provision of a detailed quotation for the proposed works including all materials, labor, and any other associated costs.**
- **Removal of the existing awnings (if required).**
- **Installation of new awnings (if required).**
- **Provision of all necessary permits and approvals.**
- **Compliance with all safety and environmental regulations**

THANK YOU!



Questions?