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# DEVELOPING SPECIFICATIONS

*2019 AGENCY PURCHASING CONFERENCE*

# OBJECTIVES

- Discuss the role of specifications in the procurement process
- Discuss the use of the mandatory format templates
- Discuss some of the issues commonly seen in specification writing and how these can be subsequently minimized
- Analyze some strategies for writing specifications

# WHAT ARE SPECIFICATIONS?

- Specifications
  - A specification is a concise statement explaining the type of product or service, the quality level, and special requirements in design, performance, delivery, and usage

# WHAT ARE SPECIFICATIONS?

- A good specification is...
  - Clearly understandable to the buyer, seller, and general public
  - Complete
  - Concise
  - Identifiable whenever possible with some brand or specification already on the market

# WHAT ARE SPECIFICATIONS?

- Specifications include...
  - Mandatory Requirements
    - When you know what you need
    - Using such terms as:
      - “Will,” “Shall,” “Must,” “Minimum,” and “Maximum”
  - May include Non-Mandatories
    - Using “should” leaves room for items you want but are not a “must”

# ACQUISITION PLANNING

- Acquisition Planning
  - Define need
  - Check availability through internal sources
  - Check availability through mandatory contracts
    - Research the market, find out all the details you can about what your product should do and what it should not do
  - Identify possible vendors
  - Consider acquisition and delivery lead time
  - Create specifications for the commodity

# DEVELOPING SPECIFICATIONS

- Types of specification formats
  - The One-Time Purchase format is used for a one-time purchase of a commodity that is shipped from the vendor and delivered to the agency.
  - The Services format is used when the vendor will perform a service. Language is included regarding qualifications, performance, travel expenses, and facility access.
  - The Open-End format is used for a master agreement with a fixed price where multiple orders will be placed throughout the year.

# DEVELOPING SPECIFICATIONS

- Types of specifications
  - “Brand Name(s) or Equal” specification based on product known on the market as a basis of design. Must allow for competition and contain the phrase “or equal” to get features and functionality needed.
  - I 48 CSRI 6.5 SPECIFICATIONS:
    - 6.5A.3.A spending unit that uses a “brand or vendor name” to describe a needed commodity or service must also list in the specifications the mandatory components of that commodity or service that the reference to a brand or vendor name is intended to capture.



# DEVELOPING SPECIFICATIONS

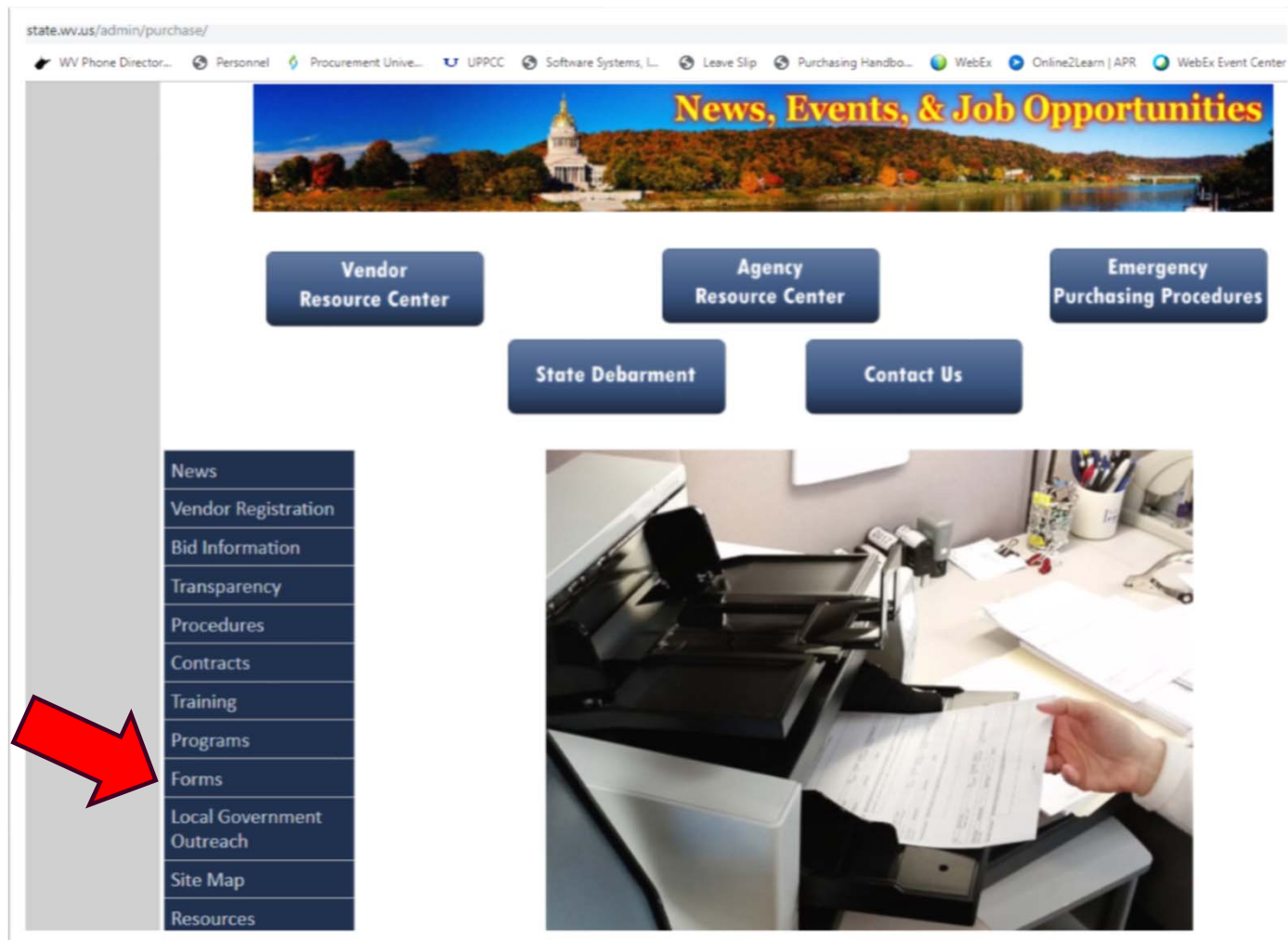
- Types of specifications
  - “Brand Name(s) or Equal” example:
    - Konica Minolta or equal that will allow printing onto paper and envelopes three inches wide or three inches long, legal paper (8-1/2" x 14"), and oversized paper.

# DEVELOPING SPECIFICATIONS

- Several sets of templates related to procurement transactions have been developed and are mandatory for use by state agencies to streamline processing transactions

TEMPLATES AVAILABLE FOR USE	
Request for Proposal (RFP) Standard Format	Services Request for Quotation (RFQ) Standard Format
Expressions of Interest (EOI) Standard Format	Elevator Maintenance Standard Format
Catalog Discount Request for Quotation (RFQ) Standard Format	HVAC Maintenance Standard Format
One-Time Purchase Request for Quotation (RFQ) Standard Format	Software Maintenance and Support
Open-End Request for Quotation (RFQ) Standard Format	

# DEVELOPING SPECIFICATIONS



# DEVELOPING SPECIFICATIONS

state.wv.us/admin/purchase/forms.html

WV Phone Director... Personnel Procurement Unive... UPPCC Software Systems, L... Leave Slip Purchasing Handbo... WebEx OnlineLearn | APR WebEx Event Center Trainer Certification...

The following forms are in PDF format. Use your [Adobe Reader \(TM\)](#) to view and print them:

1. [Vendor Registration & Disclosure Statement and Small-, Women-, & Minority-Owned Business Certification \(Form WV-I\)](#): To subscribe to the [West Virginia Purchasing Bulletin](#) and participate in the competitive bid process, a completed Vendor Registration & Disclosure Statement (Form WV-I) and an annual fee of \$125.00 is required. Prospective vendors should also complete an [IRS Form W9](#) and submit it along with the Form WV-I.
2. [Vendor Registration & Disclosure Statement and Small-, Women-, & Minority-Owned Business Certification \(WV-IA\)](#): For registering sole-source vendors or vendors whose aggregate sales to state agencies are \$2,500 or less in any one year; includes a section to be completed by the requesting state agency; NO FEE REQUIRED. Prospective vendors should also complete an [IRS Form W9](#) and submit it along with the Form WV-IA.
3. [Agreement Addendum](#): Vendors may be asked to sign and submit this form when proposing alternate terms and conditions.
4. [Purchasing Affidavit](#): This form is used to certify that bidders do not owe any debts to the state which would preclude them from receiving a purchase order.
5. [Drug Free Workplace Conformance Affidavit](#): This form is required to bid for public improvement contracts.
6. [Drug Free Workplace Report Coversheet](#): Vendors should complete this coversheet and attach it to the required report.
7. [Vendor Preference Certificate](#): This form is used for certification and application of bidders which are eligible to receive vendor preference in accordance with West Virginia Code §5A-3-37 (Does not apply to construction contracts).
8. [Disclosure of Interested Parties to Contracts](#): This form is required by business entities entering into contracts with a value of \$1,000,000 or more with state agencies.
9. [Bond Forms](#): Official bond forms which have been approved by the Office of the Attorney General, including Bid Bond, Labor and Material Payment Bond, Maintenance Bond, and Performance Bond forms.
10. [Supplementary Conditions to AIA Forms](#): Supplementary Conditions to AIA Forms which have been approved by the Office of the Attorney General.

STATE EMPLOYEES

[Purchasing forms for internal use](#)

The link given above is to an intranet which may not be accessible to computers outside the state network.

# DEVELOPING SPECIFICATIONS

The screenshot shows a web application interface. At the top, there is a dark blue header bar. Below it, a navigation menu contains buttons for CALENDAR, DEPARTMENTS, FORMS, PHONE BOOK, REPORTING, and TRAINING. On the left side, there is a blue sidebar with a gold outline of the state of Indiana and links for HOME, SEARCH, and COMMENTS. The main content area has the word "FORMS" in large, gold, serif font. Below this, a red arrow points to the text "Please enter in the information for the form you are searching for." This text is followed by a form with three fields: "Organization that keeps the form :" with a dropdown menu showing "Purchasing", "Title of the form :", and "Description of the form :". At the bottom right, there are two buttons: "Search" and "Reset Search Values".

CALENDAR	DEPARTMENTS	FORMS	
PHONE BOOK	REPORTING	TRAINING	

HOME  
SEARCH  
COMMENTS

## FORMS

Please enter in the information for the form you are searching for.

Organization that keeps the form :

Title of the form :

Description of the form :

# DEVELOPING SPECIFICATIONS

## [HVAC Maintenance Standard Format](#)

Format: [Microsoft Word](#)

## [Insurance Guidance Document for Purchasing](#)

Format: [PDF](#)

West Virginia Board of Risk and Insurance Management provides guidance on insurance requirement to agency purchasers; refer to Appendix G in the Procedures Handbook.

## [Multiple Award Determination \(WV-70\)](#)

Format: [PDF](#)

Agencies are required to complete this form at the time of acquisition in order to determine that an award to multiple vendors is in the best interest of the state.

## [One-Time Purchase RFQ Standard Format](#)

Format: [Microsoft Word](#)

## [Open-End RFQ Standard Format](#)

Format: [Microsoft Word](#)

## [Purchasing Affidavit](#)

Format: [PDF](#)

This form is used to certify that bidders do not owe any debts to the state which would preclude them from receiving a purchase order.

## [Purchasing Master Terms and Conditions](#)

Format: [PDF](#)

Purchasing Master Terms and Conditions

## [Release Order \(Form WV-39\)](#)

Format:

Form number WV-39 is to be used for orders against most statewide (central master agreements) and open-end contracts processed by the Purchasing Division or at the agency level. Refer to the ordering procedure in the contract for more specific instructions. Note: Agencies should be processing agency or central delivery orders (ADO/CDO) if using wvOASIS rather than this form.

[PDF](#)

## [Request for Hospitality Service Form TMO 3](#)

Format: [PDF](#)

A Request for Hospitality Form TMO 3.0 must accompany the invoice regardless of the amount. Purchasing Division does not need to approve TMO.3.

## [RFP Agency Approval Request \(WV-110\)](#)

Format: [Microsoft Word](#)

RFP Agency Approval Request (WV-110)

## [RFP Evaluation Committee Designation Form \(WV-111\)](#)

Format: [Microsoft Word](#)

RFP Evaluation Committee Designation Form (WV-111)

## [RFP Recommendation for Award Memorandum \(WV-113\)](#)

Format: [Microsoft Word](#)

RFP Recommendation for Award Memorandum (WV-113)

## [RFP Standard Format](#)

Format: multiple formats

Standardized language for the Request for Proposal method of purchasing; refer to Appendix H in the Procedures Handbook.



# DEVELOPING SPECIFICATIONS

Home | Help | Accessible Help | Site Map | Privacy Report | Logout

Business Opportunities | Catalog Management | Vendor Registration

West Virginia Procurement Bulletin | Surplus Auctions | Purchase History

Welcome, New

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Search for Solicitation

Show Me ... [Additions](#) [Open Solicitations](#) [Closing Soon](#) [Recently Published](#) [Recent Amendments](#) [Recent Awards](#)

Keyword Search :  Go [Advanced Search](#)

First Prev Next

Solicitation	Agency/Buyer/Category	Dates	Status
Addendum #1 to Answer Questions ARFQ : RJC2000000017 <a href="#">Summary</a> <a href="#">Details</a>	DIVISION OF CORRECTIONS AND REHABILITATION Katie M Marcum	Published On : 8/14/19 Amended On : 8/15/19 Closing On : 8/19/19 3:00 PM EDT Time Left: 00:25:06 Intent Posted On:	Open
Food Cutter for SCRJ ARFQ : RJC2000000016 <a href="#">Summary</a> <a href="#">Details</a>	DIVISION OF CORRECTIONS AND REHABILITATION Katie M Marcum	Published On : 8/14/19 Amended On : Closing On : 8/19/19 3:00 PM EDT Time Left: 00:25:06 Intent Posted On:	Open
Computer Monitors for DWWM ARFQ : DEP2000000016 <a href="#">Summary</a> <a href="#">Details</a>	DEPARTMENT OF ENVIRONMENTAL PROTECTION Bobbi J Chestnut Audio/Video	Published On : 8/8/19 Amended On : Closing On : 8/20/19 10:30 AM EDT Time Left: 19:55:06 Intent Posted On:	Open

# DEVELOPING SPECIFICATIONS

Business Opportunities			Catalog Management	Vendor Registration
West Virginia Purchasing Bulletin			Surplus Auctions	Purchase History
Samsung 75" Class 4K (2160P) Smart LED TV, or equal ARFQ : EDD2000000009 <a href="#">Summary</a> <a href="#">Details</a>	DEPARTMENT OF EDUCATION Michelle L Childers Info Technology	Published On : 8/6/19 Amended On : Closing On : 8/20/19 12:00 PM EDT Time Left: 21:22:58 Intent Posted On:	Open	
HP EliteBook 840 G5 i7 or greater & Access., or Equal ARFQ : EDD2000000006 <a href="#">Summary</a> <a href="#">Details</a>	DEPARTMENT OF EDUCATION Michelle L Childers Info Technology	Published On : 8/6/19 Amended On : Closing On : 8/20/19 12:00 PM EDT Time Left: 21:22:58 Intent Posted On:	Open	
STEEL PLATES (10190335) CRFQ : DOT20000000015 <a href="#">Summary</a> <a href="#">Details</a>	DIVISION OF HIGHWAYS Crystal G Hustead Highways	Published On : 8/2/19 Amended On : Closing On : 8/20/19 1:30 PM EDT Time Left: 22:52:58 Intent Posted On:	Open	
ADDENDUM 1 6320B00 Dell 2 in 1 Windows Tablet with Dock ARFQ : DOT2000000002 <a href="#">Summary</a> <a href="#">Details</a>	DIVISION OF HIGHWAYS Angela D Johnson	Published On : 8/6/19 Amended On : 8/14/19 Closing On : 8/20/19 2:30 PM EDT Time Left: 23:52:58 Intent Posted On:	Open	
ADDENDUM #2 TO ANSWER QUESTIONS ARFQ : SMC2000000004 <a href="#">Summary</a> <a href="#">Details</a>	DIVISION OF CORRECTIONS AND REHABILITATION Beverly L Ruppert	Published On : 8/7/19 Amended On : 8/15/19 Closing On : 8/20/19 2:30 PM EDT Time Left: 23:52:58	Open	



# DEVELOPING SPECIFICATIONS

Business Opportunities | Catalog Management | Vendor Registration

West Virginia Purchasing Bulletin | Surplus Auctions | Purchase History

[New Search](#)

**Solicitation: DOT2000000012 ADDENDUM 1 HP 12X53 STEEL PILING (10190395)**

Issued: 7/25/19 Last Amended: 8/12/19 **Current Status: Open**

Closing Date: 8/14/19 1:30 PM EDT  
Time Left: **03:20:58**

Agency: DIVISION OF HIGHWAYS  
Buyer: Crystal G Hustead  
Type: Centralized Request for Quote(CRFQ)  
Category: Highways

Information: [Crystal G Hustead/crystal.g.hustead@wv.gov](mailto:Crystal.G.Hustead@wv.gov)  
Phone:(304) 558-2402 Fax:

Additional Dates: Bid Opening Date: 8/14/19 1:30 PM Award Date: More... [see Events tab](#)

**Response Option**  
[Respond Online](#)

Click the Attachments tab to view or print the solicitation document(s)

**Attachments**

File Name	Date	Description	Attachment Type
<a href="#">Final CRFQ 0803_DOT2000000012_1_CRFQ_FORM.PDF</a>	7/25/19	Assembled pdf file for document [CRFQ,0803,DOT2000000012,1] - Request for Quotes (PDF Format)	Assembled Form
<a href="#">PLEASE READ-INSTRUCTIONS TO VENDORS.pdf</a>	7/25/19		Standard
<a href="#">Complete Solicitation Documents.pdf</a>	7/25/19		Standard
<a href="#">Exhibit A Pricing Page.xlsx</a>	7/25/19		Standard
<a href="#">Final CRFQ 0803_DOT2000000012_2_CRFQ_FORM.PDF</a>	8/12/19	Assembled pdf file for document [CRFQ,0803,DOT2000000012,2] - Request for Quotes (PDF Format)	Assembled Form
<a href="#">Addendum 1.pdf</a>	8/12/19		Standard

From 1 to 6 Total: 6 [First](#) [Prev](#) [Next](#) [Last](#)

# DEVELOPING SPECIFICATIONS

Business Opportunities

Catalog Management

Vendor Registration

West Virginia Purchasing Bulletin

Surplus Auctions

Purchase History

New Search

Solicitation: DOT200000012

ADDENDUM 1 HP 12X53 STEEL PILING (10190395)

Issued: 7/25/19 Last Amended: 8/12/19

Current Status: Open

Closing Date: 8/14/19 1:30 PM EDT

Agency: DIVISION OF HIGHWAYS

Time Left: 03:20:58

Buyer: Crystal G Hustead

Type: Centralized Request for Quote(CRFQ)

Category: Highways

Response Option

Respond Online

Buyer Information

Crystal G Hustead/crystal.g.hustead@wv.gov

Additional Dates

Bid Opening Date: 8/14/19 1:30 PM

Award Date: More...

see Events tab

Phone:(304) 558-2402 Fax:

Click the Attachments tab to view or print the solicitation document(s)

Attachments

Additional Information

Terms

Criteria

Events

Amendment History

Attachments:

File Name	Date	Description	Attachment Type
<a href="#">Final CRFQ 0803 DOT200000012 1 CRFQ FORM.PDF</a>	7/25/19	Assembled pdf file for document [CRFQ,0803,DOT200000012,1] - Request for Quotes (PDF Format)	Assembled Form
<a href="#">PLEASE READ-INSTRUCTIONS TO VENDORS.pdf</a>	7/25/19		Standard
<a href="#">Complete Solicitation Documents.pdf</a>	7/25/19		Standard
<a href="#">Exhibit A Pricing Page.xlsx</a>	7/25/19		Standard
<a href="#">Final CRFQ 0803 DOT200000012 2 CRFQ FORM.PDF</a>	8/12/19	Assembled pdf file for document [CRFQ,0803,DOT200000012,2] - Request for Quotes (PDF Format)	Assembled Form
<a href="#">Addendum 1.pdf</a>	8/12/19		Standard

From 1 to 6 Total: 6

First Prev Next Last

# DEVELOPING SPECIFICATIONS

Business Opportunities
Catalog Management
Vendor Registration

West Virginia Purchasing Bulletin
Surplus Auctions
Purchase History

[New Search](#)

Solicitation: DOT2000000012
ADDENDUM 1 HP 12X53 STEEL PILING (10190395)

Issued: 7/25/19
Last Amended: 8/12/19
Current Status: Open

Closing Date: 8/14/19 1:30 PM EDT
Time Left: 03:20:58

Agency: DIVISION OF HIGHWAYS
Buyer: Crystal G Hustead
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Category: Highways

Response Option  
Respond Online

Buyer Information: [Crystal G Hustead/crystal.g.hustead@wv.gov](#)  
Phone:(304) 558-2402 Fax:
Additional Dates:
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Award Date:
More... [see Events tab](#)

Click the Attachments tab to view or print the solicitation document(s)

Lots/Lines	Attachments	Additional Information	Terms	Criteria	Events	Amendment History
Attachments:	<div>File Name</div> <a href="#">Final CRFQ 0803 DOT2000000012 1 CRFQ FORM PDF</a>	<div>Date</div> 7/25/19	<div>Description</div> Assembled pdf file for document [CRFQ,0803,DOT2000000012,1] - Request for Quotes (PDF Format)			<div>Attachment Type</div> Assembled Form
	<a href="#">PLEASE READ-INSTRUCTIONS TO VENDORS.pdf</a>	7/25/19				Standard
	<a href="#">Complete Solicitation Documents.pdf</a>	7/25/19				Standard
	<a href="#">Exhibit A Pricing Page.xlsx</a>	7/25/19				Standard
	<a href="#">Final CRFQ 0803 DOT2000000012 2 CRFQ FORM PDF</a>	8/12/19	Assembled pdf file for document [CRFQ,0803,DOT2000000012,2] - Request for Quotes (PDF Format)			Assembled Form
	<a href="#">Addendum 1.pdf</a>	8/12/19				Standard

From 1 to 6 Total: 6 [First](#) [Prev](#) [Next](#) [Last](#)

# DEVELOPING SPECIFICATIONS

## Specification Index

The West Virginia Purchasing Division is pleased to offer a repository of specification samples that may be used by state agencies and local government entities when procuring certain commodities and services. These sample specifications, which can be modified to suit your particular needs, may be used by agency procurement officers to expedite the development of specifications.

Should you have any suggestions or comments regarding these posted specifications or should you wish to request specifications to be added for a particular commodity or service, please email [Purchasing.Division@wv.gov](mailto:Purchasing.Division@wv.gov).

To search the below text on the page, you may press CTRL+F on your keyboard to browse for a key word.

Commodity or Service	Specification Template
Elevator Maintenance	<a href="#">Master Specification</a>
HVAC Maintenance	<a href="#">Master Specification</a>
Security System	<a href="#">Master Specification</a> <a href="#">General Construction Specifications (No AIA Documents)</a> <a href="#">Pricing Page Access/Camera</a> <a href="#">Pricing Page Migration of Existing Security Access System to Existing Access System</a> <a href="#">Specification Disclosure</a>
Tractor	<a href="#">Master Specification</a> <a href="#">Pricing Page</a>

# COMMON ISSUES AND PROBLEMS

- Common issues and problems in specification writing
  - Non-Quantifiable
  - Using words which may have different meanings to different people.
    - Example: Copier must be high performance and superior quality.
  - Fix: Define what high performance and superior quality mean as it relates to the copier.
    - Example: Copier must duplex a minimum of 700 copies per minute and have a resolution of 400 dpi.

# COMMON ISSUES AND PROBLEMS

- Common issues and problems in specification writing
  - Not enough requirements
  - Providing too few requirements which may not detail the expectations of the product or service
    - Example: (1) box of crayons
  - Fix: Define what size box, number of crayons per box, colors expected to be in the box, and what material the crayons should be
    - Example: (1) Crayola, or equal, 8 count box of crayons. Crayons must be wax, colors must include all of the following colors: red, orange, yellow, blue, green, purple, black and brown.

# DEVELOPING SPECIFICATIONS

- Consequences of poorly written specifications
  - Prior to award
    - Vendors may ask a lot of questions
    - Solicitation specifications may be protested
    - Bids may be rejected for not meeting mandatory requirements

# DEVELOPING SPECIFICATIONS

- Consequences of poorly written specifications
  - After an award
    - Vendor protests award
    - Dispute with winning vendor over what they are to provide
    - State loses time, money, and vendor's service trying to sort out problems
    - Contract voided



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*Don't forget to sign the attendance sheet.*

**Crystal Hustead, Senior Buyer**

Crystal.G.Hustead@wv.gov

**CONTACT US**