



# Developing Specifications for RFQs

2021 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.

- ▶ 148 CSR1 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.

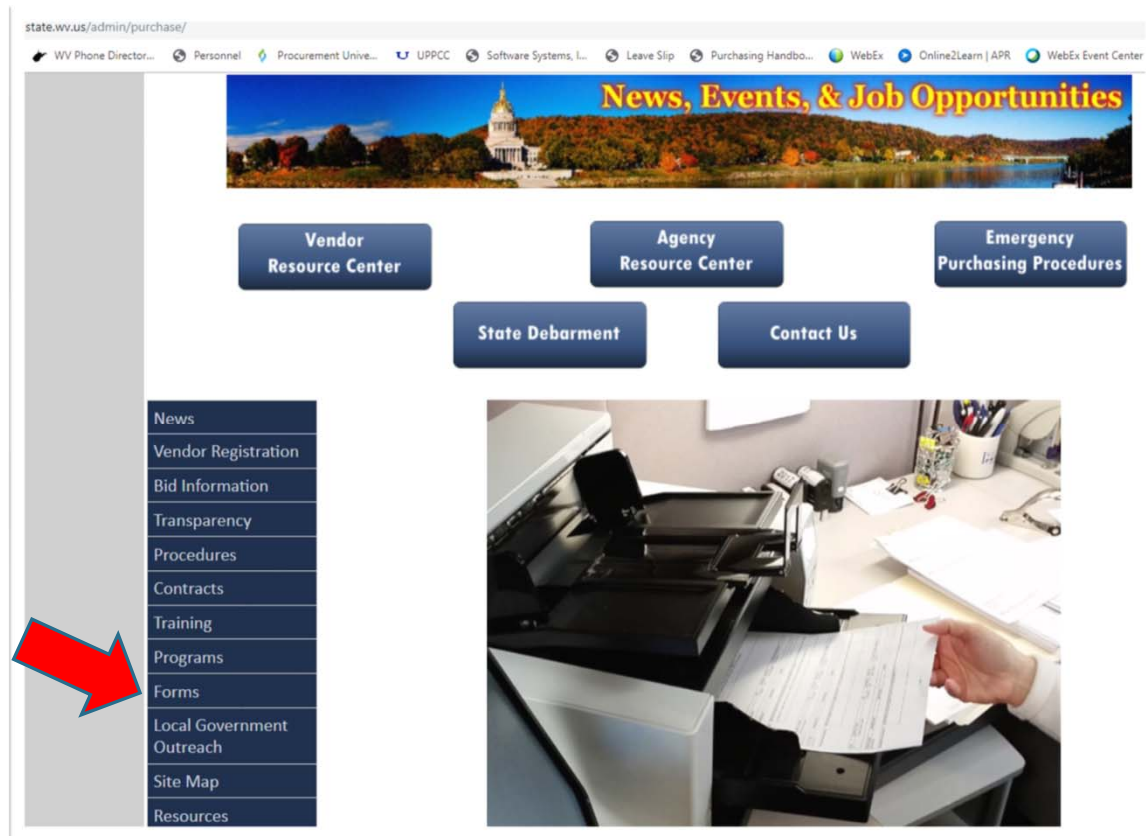


# Developing Specifications

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

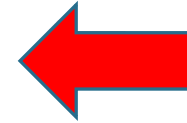
TEMPLATES AVAILABLE FOR USE	
Request for Proposal (RFP) Standard Format	Services Request for Quotation (RFQ) Standard Format
Expressions of Interest (EOI) Standard Format	Elevator Maintenance Standard Format
Catalog Discount Request for Quotation (RFQ) Standard Format	HVAC Maintenance Standard Format
One-Time Purchase Request for Quotation (RFQ) Standard Format	Software Maintenance and Support
Open-End Request for Quotation (RFQ) Standard Format	Construction Specifications (with and without AIA documents)

# Developing Specifications



# Developing Specifications

## Standard Format Templates



[Catalog Discount RFQ Standard Format](#)

[Construction Specifications Standard Format](#)

[Construction Specifications without AIA Documents Standard Format](#)

[Elevator Maintenance Standard Format](#)

[Expression of Interest Standard Format](#)

[HVAC Maintenance Standard Format](#)

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

[Open-End RFQ Standard Format](#)

[RFP Standard Format](#): Standardized language for the Request for Proposal method of purchasing; refer to Appendix H in the Procedures Handbook.

[Services RFQ Standard Format](#)

[Software Maintenance and Support Specification Standard Format](#)

[Standardization \(RFI\) \(Standard Format\)](#): Standardized language for the standardization method of Purchasing; refer to Appendix J in the Procedures Handbook.

# Developing Specifications

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				Construction	Open	
▶	08/18/2021	EOI - 2021 Design Group A Projects	DEPARTMENT OF ENVIRONMENTAL PROTECTION Joseph E Hager III	<a href="#">CEOI-0313-DEP2200000002-1</a> Centralized Expression of Interest (CEOI) Architect	09/14/2021 01:30 PM EDT 24 Days, 23:33:01 Open	<a href="#">Respond</a>
▶	08/19/2021	EOI - 2021 Design Group B Projects	DEPARTMENT OF ENVIRONMENTAL PROTECTION Joseph E Hager III	<a href="#">CEOI-0313-DEP2200000003-2</a> Centralized Expression of Interest (CEOI) Architect/Engr	09/15/2021 01:30 PM EDT 25 Days, 23:33:01 Open	<a href="#">Respond</a>
▶	08/18/2021	EOI - 2021 Design Group C Projects	DEPARTMENT OF ENVIRONMENTAL PROTECTION Joseph E Hager III	<a href="#">CEOI-0313-DEP2200000004-1</a> Centralized Expression of Interest (CEOI) Architect/Engr	09/16/2021 01:30 PM EDT 26 Days, 23:33:01 Open	<a href="#">Respond</a>

# Developing Specifications

## Centralized Expression of Interest (CEOI)

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Document ID: CEOI-0313-DEP2200000002-1 | Time Left : 24 Days, 23:31:41

### General Information

### Commodity Lines

### Attachments

### Solicitation Instructions

### Evaluation Criteria

### Terms & Conditions

### Events

#### Buyer Information

**Buyer Name**  
Joseph E Hager III

**Buyer Phone**  
(304) 558-2306

**Buyer Email**  
joseph.e.hageriii@wv.gov

**Buyer Fax**  
-

#### Important Dates

**Issue Date**  
08/18/2021

**Bid Opening Date**  
09/14/2021 01:30 PM EDT

**Closing Date**  
09/14/2021 01:30 PM EDT

**Last Amended**  
-

#### Department Information

**Category**  
Architect/Engr

**Document Department**  
0313

**Description**  
EOI - 2021 Design Group A Projects

**Type**  
Centralized Expression of Interest

**Status**  
Open

# Developing Specifications

## Centralized Expression of Interest (CEOI)

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General Information	Commodity Lines	Attachments	Solicitation Instructions	Evaluation Criteria	Terms & Conditions	Events
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1 - 4 of 4 Records

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File Name	Date	Attachment Type	Description
Solicitation Docs 8-18-2021.pdf	08/18/2021	Standard	
Attachment AML Related Project Experience Matrix (RPEM).xls	08/18/2021	Standard	
AVS F	08/18/2021	Standard	
Final_0313_DEP2200000002_1_WV_CEOI_FORM.PDF	08/18/2021	Assembled Form	Assembled pdf file for document [CEOI,0313,DEP2200000002,1] - Centralized Expression of Interest (PDF Format)



# Developing Specifications

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Document ID: CEOI-0313-DEP2200000002-1 | Time Left : 24 Days, 23:31:41

General Information	Commodity Lines	Attachments	Solicitation Instructions	Evaluation Criteria	Terms & Conditions	Events
<div><div>Buyer Information</div><div><div><div>Buyer Name</div><div>Joseph E Hager III</div></div><div><div>Buyer Email</div><div>joseph.e.hageriii@wv.gov</div></div></div><div><div><div>Buyer Phone</div><div>(304) 558-2306</div></div><div><div>Buyer Fax</div><div>-</div></div></div></div>						
<div><div>Event Dates</div><div><div><div>Issuance Date</div><div>08/14/2021 01:30 PM EDT</div></div><div><div>Closing Date</div><div>09/14/2021 01:30 PM EDT</div></div></div><div><div><div>Bid Opening Date</div><div>09/14/2021 01:30 PM EDT</div></div><div><div>Last Amended</div><div>-</div></div></div></div>						
<div><div>Department Information</div><div><div><div>Category</div><div>Architect/Engr</div></div><div><div>Type</div><div>Centralized Expression of Interest</div></div></div><div><div><div>Document Department</div><div>0313</div></div><div><div>Status</div><div>Open</div></div></div><div><div><div>Description</div><div>EOI - 2021 Design Group A Projects</div></div></div></div>						

# 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>
Tractor	<a href="#">Specification Disclosure</a>
	<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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