

SPECIFICATION INSTRUCTIONS AND DEFINITIONS

The overall purpose of a specification is to provide a basis for obtaining a good or service that will satisfy a particular need at an economical cost and to invite maximum reasonable competition. To this end, specifications may not be unduly restrictive. By definition, a specification sets limits and thereby eliminates, or potentially eliminates, items that are outside the boundaries drawn. However, a specification should be written to encourage, not discourage, competition consistent with seeking overall economy for the purpose intended. A good specification should do four things:

- A. **Identify minimum requirements**
- B. **Allow for a bid with maximum competition**
- C. **List reproducible test methods to be used in testing for compliance with specifications**
- D. **Provide for an equitable award at the lowest possible cost.**

DEVELOPING SPECIFICATIONS: Although Procurement has final responsibility for the competitiveness and suitability of specifications, Procurement cannot initiate or prepare all specifications. The size of staff necessary to do this would be prohibitive. Procurement serves as the primary activity involved in developing specifications for items purchased under indefinite quantity term contracts and definite quantity scheduled purchases. The duty of Procurement to promote both product and price competition requires that specifications be as non-restrictive as practicable, consistent with satisfying legitimate needs. Procurement is responsible for final editing of specifications, and ensuring clarity of language with jargon or in-house terminology. Purchasing will assist and advise you in developing your specifications, however, Procurement does not have expertise in every sphere of College of Charleston academic programs and staff activities.

Specifications can be prepared in a number of ways. Speaking generally, one is the specification that requires something unique, to be custom made or custom built, as is characteristic of construction or personal services contracts. The other group call for ready-made, off-the-shelf commercial items regularly available in the market place, as is characteristic of equipment, materials and supplies. Within these broad groupings are more particular types, including: brand-name specifications; brand-name-or-equal specifications; design specifications; performance specifications; and the Qualified Product List (QPL).

1. **BRAND-NAME SPECIFICATIONS:** Using brand-name specifications has the effect of limiting the bidding to a single product and is the most restrictive kind of specification. Its use will not be permitted unless only one product will meet an intended need, there are at least ten competitors that can supply the product, the department head has submitted written justification to this effect and the Director of Procurement has approved the use.
2. **BRAND-NAME-OR-EQUAL SPECIFICATIONS:** A brand-name-or-equal specification cites one or more brand-names, model numbers, or other designations that identify the specific products of a particular manufacturer as having the characteristics of the item desired. Any other brands or models substantially equivalent to those named are considered for award, with the Procurement Officer reserving the final right to determine equivalency. Brand-name-or-equal specifications have a legitimate but limited place in public purchasing.
 - A. Although there may be situations when the use of this specification is our only means of attempting to satisfy the requirement, its use should be limited and justified before solicitation. If this specification is used, tangible performance, quality or other required characteristics should be clearly defined in the bid invitation. Bidders offering an equal should be put on notice that the criteria used to define performance, quality or essential characteristics must be met to be considered responsive.
 - B. The best position is to list at least two brand names that will satisfy the requirements. Another alternative is the requirement that bidders offering products other than specified obtain approval for the product offered before bid opening. There must be sufficient basis to determine that these products are equal and this basis must be predicated upon sound evaluation criteria. Vendors should be provided the criteria for the purpose of qualifying the bid document.
3. **QUALIFIED PRODUCT LIST (QPL):** A qualified product list (QPL) is a specification based on manufacturers' names, brand names and model numbers, but it is arrived at by a systematic and formal process. A QPL is predicated on a written specification which includes certain tests or other criteria for comparing, examining and approving products before soliciting competitive bids. These criteria and the methods for establishing and maintaining a QPL varies widely for different products. Some may require that committees test the products, others may simply require that brands be tested under controlled conditions and assessments made of their performance and others may require laboratory tests. Departments wishing to establish a QPL must list the products that have been tested and are considered equal, state testing methods used to establish the QPL and indicate steps to be taken by vendors to add products to the QPL.

4. **DESIGN SPECIFICATIONS:** Design specifications customarily employ dimensional and other physical requirements of the item being purchased. "Design" in this sense means that the specification concentrates on how the product is to be put together. It is the most traditional kind of specification, having been used historically in public contracting for buildings, highways, and other public works, and represents the kind of thinking in which architects and engineers have been trained. Its use is called for where a structure or product has to be specially made to meet the purchaser's unique need. Departments using design specifications must submit complete specifications with all necessary drawings, dimensions, terms, and definitions of non-standard terms. Materials used must be described fully to include thickness, size, color, etc.

5. **PERFORMANCE SPECIFICATIONS:** The terms "functional" and "performance" are used interchangeably to designate an approach to specifications that is less interested in dimensions and materials and configurations and more interested in what a product does. The performance specification is less interested in how a product is made, and more interested in how it performs, how well it performs, and at what cost. Performance purchasing is results orientated in terms of function and cost. In contrast to the design approach, performance specifications afford the manufacturer or bidder sizable latitude in how to accomplish the end purpose. Performance requirements describe the characteristics and capabilities that are pertinent to the intended use of the article. Departments using performance specifications must explain in detail the results required, testing methods, and characteristics that the goods or service must perform.