

## Specification Guide (7/1/14)

The following information is a basic guide for drafting specifications.

Items may be added or deleted as necessary for the commodity/service requested.

Components	To be provided by the end user Department	
	Guideline for Goods Specifications	Guideline for Services Specifications
<b>What</b>		
What do you need?	<ol style="list-style-type: none"> <li>1. General description of the product and/or accessories (physical/functional/quality characteristics, size, dimensions, grades, standards, etc.)</li> <li>2. Tolerances (minimum acceptable standards)</li> <li>3. Intended use</li> <li>4. Expected outcome</li> <li>5. Data requirements</li> <li>6. Quantities &amp; unit of measure</li> <li>7. Anticipated frequency of need</li> <li>8. Warranties and/or training</li> </ol>	<ol style="list-style-type: none"> <li>1. General description/scope of the services</li> <li>2. Capabilities/expected outcome</li> <li>3. Tolerances (minimum acceptable standards)</li> <li>4. Data requirements</li> <li>5. Future needs</li> <li>6. Anticipated frequency of needs</li> </ol>
<b>Why</b>		
Why do you need it?	<ol style="list-style-type: none"> <li>1. First time purchase</li> <li>2. Replacement purchase</li> <li>3. Continuing operation need</li> <li>4. Background</li> </ol>	<ol style="list-style-type: none"> <li>1. First time purchase</li> <li>2. Replacement purchase</li> <li>3. Continuing operation need</li> <li>4. Background</li> </ol>
<b>Where</b>		
Where will goods be delivered/services be performed?	<ol style="list-style-type: none"> <li>1. Address, building, room number</li> <li>2. Docking available</li> <li>3. University contact person</li> <li>4. Drawings, if applicable</li> </ol>	<ol style="list-style-type: none"> <li>1. Address, building, room number</li> <li>2. Delivery of any materials</li> <li>3. University contact person</li> </ol>
<b>When</b>		
When do you need it?	<ol style="list-style-type: none"> <li>1. Timeline and contract term</li> <li>2. Renewals options</li> <li>3. Milestones</li> <li>4. Payments due</li> </ol>	<ol style="list-style-type: none"> <li>1. Timeline and contract term</li> <li>2. Renewals options</li> <li>3. Milestones</li> <li>4. Payments due</li> </ol>
<b>How</b>		
How will it be provided/performed?	<ol style="list-style-type: none"> <li>1. Delivery/Assembly/Installation requirements</li> <li>2. Any University or special conditions</li> <li>3. Packaging requirements</li> <li>4. Disposal requirements (packaging, hazardous materials, etc...)</li> <li>5. Performance measurement criteria</li> <li>6. Sampling, inspection and testing procedures</li> </ol>	<ol style="list-style-type: none"> <li>1. Performance/delivery conditions</li> <li>2. Advice necessary</li> <li>3. Expertise needed</li> <li>4. Performance measurement criteria</li> </ol>
<b>Pricing Strategy</b>		
	<ol style="list-style-type: none"> <li>1. Fixed price</li> <li>2. Expenses allowed</li> <li>3. Hourly rate</li> <li>4. Unit of measure</li> </ol>	<ol style="list-style-type: none"> <li>1. Fixed price</li> <li>2. Expenses allowed</li> <li>3. Hourly rate</li> <li>4. Unit of measure</li> </ol>
<b>Who</b>		
Who could provide/perform goods/services?	<ol style="list-style-type: none"> <li>1. Potential vendors</li> </ol>	<ol style="list-style-type: none"> <li>1. Potential vendors</li> </ol>

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### Keys to a successful specification:

- Specifications should be clear and accurate and not so specific they eliminate competition.
- Specifications should be easily understood by the potential vendor and the end user.
- All acronyms, abbreviations and unique terms should be clearly defined.

### NOTE:

- Brand name or equal specifications may be used in a competitive solicitation when no specification for a common or general use specification or qualified products list is available, time does not permit the preparation of another form of specification, the nature of the product or the nature of the University's requirement makes use of a brand name or equal specification suitable for the procurement, or use of a brand name or equal specification is in the University's best interest (44 Ill. Admin. Code 4.2050.c).
- A brand name only specification may be used in a competitive solicitation provided the State Purchasing Officer (SPO) makes a written determination that only the identified brand name item will satisfy the University's needs (44 Ill. Admin. Code 4.2050.d).
- No person or business shall bid or enter into a contract if the person or business assisted the University in determining whether there is a need for a contract, except as part of a response to a publicly issued RFI, or assisted the University by reviewing, drafting or preparing any IFB, RFP, or RFI or provided similar assistance, except as part of a publicly issued opportunity to review drafts of all or part of these documents (44 Ill. Admin. Code 4.2050.i).
- Communications reporting is required when written or oral communication is received by a State employee who, by the nature of his or her duties, has the authority to participate personally and substantially in the decision to award a State contract and that imparts or request material information or makes a material argument regarding potential action concerning an active procurement matter (30 ILCS 500/50-39).