

GOODS & SERVICES; SPECIFICATIONS AND SCOPE OF WORK
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INTRODUCTION

- ▶ The purpose of this session is to provide information and advice about developing specifications and scope of work for procurements.
- ▶ Writing good specifications and a scope of work is one of the hardest elements a purchasing official must learn to do.
- ▶ It is an art and skill developed over time with practice and experience.

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INTRODUCTION

- ▶ A specification writer is always learning!
- ▶ Specification writing is a journey where one never reaches their destination. (yes we are corny)
- ▶ Specification writers must have a little knowledge of a lot of things, and be able to express that knowledge in basic terms.
- ▶ Specification writers must keep it simple yet be able to express the complexity of the project.

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INTRODUCTION

- ▶ A Good SOW or Specifications MUST BE:
 - Clear
 - Accurate
 - Exact
 - Brief but Precise
 - Thorough and Complete

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WHAT IS A SCOPE OF WORK

- ▶ A scope of work (SOW) is a document that specifies all the criteria needed between a service provider (vendor) and the entity. It can be used for goods and services under the bid threshold as well as for professional services.
- ▶ It clearly documents the project requirements, milestones and deliverables that are expected to be provided by the vendor.
 - A scope of work gives a clear picture on the complete project requirements so that both parties are on the same page.
 - A standard scope of work document contains the following elements:
 - Objectives/Purpose Statement
 - Requirements of SOW
 - Evaluation Criteria
 - Fee Schedule
 - Required legal documents if necessary
 - Clearly defines what is expected

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CHALLENGES FACED IN CREATING A SOW

- ▶ Complex in Nature – project is so complex that you do not have an understanding of what is needed or end user does not understand what is needed.
- ▶ Time Constraints – rushing your SOW can cause important facts to be omitted.
 - SOW could be too ambiguous, too rigid or missing key information that can lead the vendor's response to be incomplete.
 - Poorly written SOW can lead to delays, cost increases and legal battles.

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WHAT IS A SPECIFICATION

- ▶ A specification can be defined as a statement of needs. It is a concise statement of a set of requirements to be satisfied by a product, material, or a process. You use your specification as part of a publicly advertised bid.
- ▶ It defines what the procurer wants to purchase and consequently what the vendor or supplier is required to provide.
 - A Specification can be simple or complex depending on the need.
 - The specification must outline what you are requiring: defines what the function of the goods or services is: and the time frame of delivery:
 - A specification gives an example of a known product or service which would be appropriate and allow for alternate working of "or equivalent" .

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WHAT IS THE APPROACH

- ▶ Two very important considerations must be determined before a specification can be established:
 - ▶ First, it must be ascertained what the end-user's requirements are and what the actual needs are.
 - -what are you buying?
 - -how much of the product do you need?
- Second, the contracting agent can ask themselves a series of questions.
- Is the product or service available ?
 - How much does the product or service cost?
 - Does the using department or agency have the funding to procure the services?

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WHAT SHOULD A GOOD SPECIFICATION DO

- ▶ Regardless of the type of specification being developed, some factors should be considered in the planning process. The specification writer has a tremendous responsibility; carefully designed and properly used specifications are a powerful tool. There are four characteristics of a good specification:
 - ▶ 1. Identify minimum requirements
 - ▶ 2. Allow for a competitive bid
 - ▶ 3. List reproducible test methods to be used in testing for compliance with specifications
 - ▶ 4. Provide for an equitable award at the lowest possible cost.

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WHAT ARE THE BENEFITS OF SPECIFICATIONS

- ▶ There are several benefits of well-written specifications:
 - All vendors and contractors are able to compete on an equal basis.
 - Product order disputes can be minimized.
 - A good set of requirements enables the project manager to plan and estimate the project well.

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INCORRECT SPECIFICATIONS

- When specifications are written incorrectly, there exists problems:
- Questions arise as to whether the contract tells the vendor in reasonable precise terms what he or she is responsible for doing in order to comply with the contract.
- More importantly, a contracting unit must determine whether the contract is being adhered to, and whether payment should be authorized to a vendor for satisfactory performance.

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BAD SPECIFICATIONS & SCOPE OF WORK LIVE FOREVER

- One thing is for sure if your specifications or scope of work are written poorly everyone will know!
- Bad specifications can cost your entity money, time, labor and can be an embarrassment.
- Bad specifications last a lifetime!

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HOW SPECIFICATIONS LIVE FOREVER

The US standard railroad gauge, (distance between the rails) is 4 feet, 8.5 inches. That is an exceedingly odd number. Why use this? Because that's the way they built them in England and the US railroads were built by English expatriates. Why did the English build them like this? Because the first rail lines were built by the same people who built the pre-railroad tramways and the gauge they used.

Why did they use that gauge? Because the people who built the tramways use the same jigs and tools that they used for building wagons, which used the wheel spacing. Okay! Why did the wagons use that odd wheel spacing? Well, if they tried to use any other spacing, the wagons would break on some of the old, long distance roads, because that's the spacing of the old wheel ruts. So, who built those old rutted roads? The first long distance roads in Europe were built by Imperial Rome for the benefit of their legions. The roads have been used ever since. And the ruts? The initial ruts, which everyone else had to match for fear of destroying their wagons, were first made by Roman war chariots. Since the chariots were made for or by Imperial Rome, they were alike in the manner of wheel spacing.

Thus, we have the answer to the original questions. The US standard railroad gauge of 4 feet, 8.5 inches derives from the original specification for an Imperial Roman army war chariot. Specs and Bureaucracies live forever. So, the next time you are handed a specification and wonder what horse's ass came up with it, you may be exactly right. Because the Imperial Roman chariots were made to be just wide enough to accommodate the back-ends of two war horses.

Source Unknown

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FAMOUS QUOTES



- ▶ "I felt exactly how you would feel if you were getting ready to launch and knew you were sitting on top of 2 million parts — all built by the lowest bidder on a government contract."

Attributed to John Glenn

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QUESTIONS AND ANSWERS

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