

TEXAS A&M UNIVERSITY-KINGSVILLE

Title: Preparation of Specifications
Procedure No.: PP-050

Approved by:
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I. Purpose

This procedure outlines a checklist for evaluating competitive specifications.

II. Scope

This procedure shall apply to all purchases that require detailed specifications.

III. General

Use this checklist to determine if a proposed specification is sufficient to ensure competition and complete enough to ensure that the user is describing the desired outcome.

YES NO

- | | | | |
|-------|--|--|--|
| 1.0 | Does the <u>solicitation (Invitation for Bids/Proposals)</u> have the following characteristics? | | |
| 1.1 | Provides quality specifications which: | | |
| 1.1.1 | Allows for both product and price competition? | | |
| 1.1.2 | Identifies the <u>minimum acceptable requirements</u> of the user? | | |
| 1.1.3 | Establishes <u>performance</u> and/or <u>design</u> characteristics with which compliance can be enforced? | | |
| 1.2 | Provides a methodology for bid evaluation and for an equitable award to the responsible bidder rendering the best value with all the mandatory specifications, terms, and conditions (the lowest responsive responsible bidder)? | | |
| 1.3 | Provides general and special terms and conditions which protect the interests of the University and the State? | | |
| 2.0 | Does the <u>quality specifications</u> have the following characteristics? | | |
| 2.1 | Competitive in both product and price? | | |
| 2.2 | Simple, but exact? | | |

- 2.3 Verifiable (i.e., capable of being checked)?
- 2.4 Reasonable?
- 2.5 Fair?
- 2.6 Clear?
- 2.7 Flexible?
- 2.8 Legible and concise?
- 2.9 Provides brand examples and references (at least two acceptable brand examples are desirable)
- 3.0 From both the Vendor and User standpoint, are the following answered (when appropriate) by the solicitation (specifications) document?
 - 3.1 What item, material, equipment, or service is needed?
 - 3.2 What quantity or level of effort is needed?
 - 3.3 Is the proper unit of measure used?
 - 3.4 Who is the end user?
 - 3.5 What is the intended use? (What is to be accomplished)
 - 3.6 What are the conditions of use?
 - 3.7 What specific minimum essential functions must be performed?
 - 3.8 Are limitations (weight, size, strength, compatibility, etc.) prescribed?
 - 3.9 What are the power and special environmental needs (electric voltage, wattage, air conditioning, water, drains)?
 - 3.10 Are there special statutory or regulatory requirements?
 - 3.11 What are the operator/maintenance manuals, or other documentation needs?
 - 3.12 Are there special delivery needs?
 - 3.12.1 Scheduled shipments?
 - 3.12.2 On call shipments?
 - 3.12.3 Just in time shipments?
 - 3.12.4 Stockless inventory?
 - 3.12.5 Inside delivery and/or assembly?

- 3.12.6 Multiple delivery locations?
- 3.13 What is the frequency of the service or task?
- 3.14 What are the installation needs?
- 3.15 What are the inspection, testing, and acceptance needs?
 - 3.15.1 Samples (or statistical/sequential sampling)?
 - 3.15.2 Plant inspections?
 - 3.15.3 Laboratory tests?
 - 3.15.4 Manufacturer's certifications?
 - 3.15.5 Bench marks?
 - 3.15.6 Demonstrations?
- 3.16 What are the minimum needs for warranty?
 - 3.16.1 Type?
 - 3.16.2 Coverage?
 - 3.16.3 Terms?
 - 3.16.4 Service center location? On site service?
- 3.17 What are the minimum needs for on call/on site remedial and/or preventative maintenance service?
 - 3.17.1 Response Time?
 - 3.17.2 Principal Period of Maintenance?
 - 3.17.3 Method of Billing?
- 3.18 What are the minimum needs for manufacturer support?
- 3.19 Have the following special needs been addressed?
 - 3.19.1 Conversion of the present system?
 - 3.19.2 Switch over from present system?
 - 3.19.3 Trade Ins (as is where is)?
 - 3.19.4 Performance, payment, and/or bid bonds?
 - 3.19.5 Liquidated Damages?
 - 3.19.6 Expediting (critical timing)?

- 3.19.7 Options, (additional items, extension of term, etc.)?
- 3.19.8 Cancellation provisions?
- 3.19.9 Method of financing (payment schedule)?
- 3.19.10 Insurance requirements (liability, personal injury, workers' compensation)?
- 3.19.11 Term of contract? Renewability? Aligned with Fiscal Year?
- 3.19.12 Safety?
- 3.19.13 Initial operating supplies to be included (filters, consumables, etc.)?
- 3.19.14 Special licenses and reports (hazardous wastes, radiation, asbestos abatement, etc.)?
- 3.20 Is there a need for a pre bid conference?
- 3.21 What is the methodology of the bid evaluation?
 - 3.21.1 Best Value? Does bid specify value factors in determining the award for the following items?
 - 3.21.1.1 Best Price?
 - 3.21.1.2 Installation Costs?
 - 3.21.1.3 Life Cycle Costs?
 - 3.21.1.4 Quality and Reliability of the goods or services?
 - 3.21.1.5 Delivery Terms?
 - 3.21.1.6 Indicators of probable vendor performance?
 - 3.21.1.7 Cost of Employee training?
 - 3.21.1.8 Effect on University productivity?
 - 3.21.1.9 Other factors?
 - 3.21.2 Lowest Price?
 - 3.21.3 Demonstrated Performance? Does bid document performance values?
 - 3.21.4 Approved Products List?
- 3.22 Are any standard clauses required?
- 3.23 Does the bid require reference to standards (UL, OSHA, ASME, ASTM, etc.)?

- 3.24 What special terms and conditions are required to administer the contract?
- 4.0 In your opinion, will these “competitive” specifications, terms and conditions, and bid evaluation method, achieve the purchasing goals of:
- Buying the right quality?
 - Buying the right quantity?
 - Buying at the right time?
 - Buying at the right price?
 - Buying from the right supplier?
 - Buying in the right manner?