**Guidance on writing a specification**

1. **Specification**

The specification is a key part of the tender documentation. The specification describes as accurately as possible the supplies, services or works that the Council requires. In some cases it will be a highly prescriptive specification (for example, where a specific item of equipment is required). In other cases the specification may be output or outcome focused, where the Council describes expected standards and results, but is not necessarily prescriptive regarding how this is achieved.

Preparing a specification requires in-depth research to be carried out and a great deal of accuracy. A poor description of the Council's requirements may mean that the product or service is not delivered to the standards required, and late changes to a specification may result in additional costs.

**2. Writing the Specification**

**2.1 Pre-specification tasks**

• Ensure that there is a clear understanding of what is required. If producing a specification for another party, identify and agree the customer or user’s requirements and again, ensure that they are fully understood.

***Top tip to remember: A common error is to over specify, this is likely to result in higher costs. The classic example is producing a specification for a sports car when all that is required to perform the task is a bicycle!***

• For works, analyse any existing provisions to determine the impact of the new proposals and the relationship of new to existing

• Research the market by carrying out market engagement – speak to suppliers, other purchasers, industry associations, etc. to identify possible solutions, indicative costs and delivery time-scales

• Identify the possible risks associated with the procurement process so that ways of controlling the risks can be built into the specification

• Identify the scope of the contract and what the range of goods and services are which the supplier will be asked to deliver

• Identify the evaluation criteria so that the specification will reflect the importance of each criteria

• Determine how you will monitor performance of the contract.

**2.2 Structure of the Specification**

Specifications will vary in length and complexity depending on the nature of the product or service being procured.

Areas in most specifications which should be included unless there is valid reason otherwise:

• Introduction & Scope - The introduction should briefly explain the requirement and the context of that requirement. The scope will address areas such as anticipated demand or volumes, whether the supplier is to supply only, supply and install, provide training, provide support documentation, etc. and, where appropriate, should identify specifically what is not to be included.

• Background – The more information a tenderer has, the better able he or she is able to respond to the tender. Background information may cover, where appropriate, the reason the Council is tendering, its expectations, the implications for the Council implementing the solutions etc. It may also explain how the solutions may link into other requirements and applications whether already implemented or planned for the future.

• Service Conditions and Environmental Factors – Explain any factors which may have a bearing on the operation of the goods or services. For example, if the physical environment may impact on the output design or performance, the specification must highlight these conditions. Examples are:

* Operating and storage conditions
* The need for interchangeability or compatibility with existing services and equipment
* Personnel and health and safety aspects
* Existing facilities to be maintained throughout a contract period and what has to be done to ensure this

The specification must also cover any particular sustainability requirements, for example, energy usage and the recycling capability of the goods.

• Statement of Requirements - The statement of requirement must contain a description of the outputs for services or functionality and performance requirements for goods. Details of the performance indicators and benchmarks that will be monitored during the contract period must also be included.

The statement of requirements will vary significantly in scale and complexity depending on the size and nature of the contract but may contain some or all of the following:

***Services:***

Required outputs and/or outcomes

Performance measures/Targets/ Reporting requirements

Management of the contract

Transfer of assets and personnel

The hand-over process

Transition between service providers

***Goods:***

Design and performance criteria

Functional, Performance and Technical characteristics

Standards

Compatibility and standardisation

Acceptance testing

Trade-ins

***Works:***

List drawings and other guidance provided

Details of access, ground conditions and preparation work

Performance criteria including contractors’ designs

Relationships with subcontractors and suppliers

Employer’s contractual and legal requirements

Works management including completion and defects

Control of time and cost

Quality control, standards and checks required

Health and safety

Temporary facilities

There are also strict rules in the EU procurement regulations about naming proprietary brands in specifications; it is not possible to specify brand names since this may distort competition.

• Quality Requirements - The specification should address the quality processes and standards expected of the supplier. For supply contracts, the quality of the goods required must be clearly defined.

***Top Tip: if there are any mandatory quality levels that must be met, then this should be build into the specification rather than given a weighting in the evaluation criteria.***

• Whole of life support - This section should state what maintenance is required and any modifications or upgrades that may be required in the future plus any warranties required.

• Security - If security is an issue then this section should ask suppliers about how the confidentiality of personal and commercial information will be handled. It may also address security issues such as theft-reduction measures.

• Training - Any training which is required for the product or service in question should be clearly identified and the supplier should be required to state what will be provided, plus the cost of any additional training requirements that may be required above the levels agreed in the tender process.

• Implementation timetable - The implementation timetable should be fully detailed including the commencement date, delivery date(s), milestones, and a completion date. The Council must specify the required dates and not ask the supplier when he or she can deliver, although the supplier can be asked to provide costed variations if deemed appropriate.

• Definitions – In addition to the definitions in the contract part of the tender, it is important that there is a list of definitions, or a glossary of terms, to ensure that technical words and phrases in the specification are mutually understood. Failure to define key words and phrases may lead to misunderstandings and inappropriate solutions.

**3 Evaluation Criteria**

The evaluation criteria that will be used to assess the submitted tenders must be developed at the same time as the specification. The evaluation criteria must reflect the key needs of users and should be included in the specification so tenderers can construct their bids accordingly.

Only evaluation criteria which was included in the tender should be used when bids are assessed, so it is important to identify all the relevant criteria early in the process. If you have created an accurate specification with all the key requirements then the evaluation criteria should be an easy task. Try not to fall into the trap of scoring a quality requirement which could have been built into the specification.

***Top tip: A watertight specification will enable you to compare like for like and allow you to achieve greater value for money by scoring on 100% price.***