

GUIDANCE ON SPECIFICATION WRITING

The specification for goods, works or services is a description of what is required. It is best to focus on service or product outcomes rather than inputs to allow reasonable scope for innovation. It should be clear, to the point and jargon free.

Colleagues or other local authorities or organisations may be able to provide you with **examples** of specifications related to your project. Frequently far too little time is spent compiling the specification, and yet this is the core part of the tender documents and if this is not properly prepared the contract will not deliver exactly to your requirements. A clear and concise specification will reduce the number of queries you will get from tenderers.

Do not be tempted simply to take a specification from a previous project and re-issue it with just a name change.

As far as possible research your market to establish what is available and to check that your service or product is available. You may send the specification to interested parties and ask for comments. It may be appropriate to consult with a small number of proposed tenderers on the specification before finalising the details, particularly where there is no established market for your service/product. When doing this be careful not to write the specification in such a way as to appear to give favour to one provider over another. Ensure that your specification does not deviate from the details provided in the national or EU advertisements.

Evaluation

Whilst writing your specification give some thought to how you will evaluate the tenders and how the successful contract will be monitored. The specification and tender documents should always reflect evaluation criteria and contract monitoring arrangements. If it is the intention to apply quality thresholds or to carry out quality evaluation you must establish the criteria and include them in the tender documentation.

Relevant information

Only include relevant information. For instance, if you require a service be provided within 7 days say why - there may be a cost implication. If better planning means it could be provided within a greater/lesser timescale that better suits your tenderers it may create more interest and allow greater innovation.

Legal requirements & council standards

Consider what legal regulations and council standards are relevant to your contract and ensure that there is adequate provision, particular concerns include health & safety, construction & design management, sustainability issues, insurances, risk management etc.

References to brand names or standards

Never refer to particular makes, brands, sources or processes that have the effect of favouring one supplier over another. Makes, sources or proprietary names can only be referred to where this is justified by the subject matter or the product cannot be otherwise specified by technical standards. In these cases the reference must be followed by the words 'or equivalent'.

Where British standards are mentioned in specifications they should be followed by the words 'or equivalent'.

Structure of a specification

The structure of a specification for goods/services and the amount of detail required for the specification will be set by the value and complexity of the goods/services. The structure given here is a suggestion. Each of the headings below would be a separate section of the specification. The text under the headings is an indication of the kind of issues that should be covered.

1. Cover sheet

Title of the contract, date, department name and logo, lead officer name and contact details.

2. Contents page

3. Overview

An overview of the contract requirements

Why do we need the goods/services?

What will they be used for?

What is critical to the council in relation to them?

How will the contract assist Southwark in the performance of its functions?

Details of the requirements to comply with best value legislation and demonstrate value for money.

4. Background & scope

Include details of current arrangements

Information on the purpose and objectives of the goods/services and the users/departments.

Volumes required

Installation and maintenance requirements

What is not part of the contract (if this needs to be made clear)

Operational environment and other issues that might influence the contract provision

Benefits expected from the contract and any operational problem that may need to be resolved

Contracts duration and proposed start date.

5. Supplier responsibilities:

List of the specific tasks to be performed by the supplier

Outcome or output specification ie the service must achieve

Contract management e.g. dedicated contract phone number (especially if requiring an 'out of hours' service)

Resources or qualifications required (for service contracts)

Delivery requirements

Procedural issues

Guarantees to be included

Maintenance and back-up

Decommissioning/ installation tasks

Invoicing

Urgent requirements

Variation in requirements

Documents and records to be maintained by the supplier

Critical time-scales
Communications
Pre and Post tender meetings
Responsibilities at the end of the contract.

6. Technical and/or quality requirements

Technical standards to which the goods must conform (if needed)
(Add the words 'or equivalent' after any British standard)

Any particular standards or features that will help set the expected quality levels or equipment performance standards.

Performance indicators if appropriate

Environmental/legislative/health & safety requirements.

Explain clearly if you are interested in delivery ideas from tenderers.

7. LB Southwark responsibilities

Specific issues that will form part of the council's obligations, eg. Ensuring access, facilities and equipment to be made available to the supplier.

8. Payments, charging & invoicing

Details about payments etc must be included in the contract terms and conditions. Check that all is covered to your satisfaction.

Further information is available from the business managers handbook at:
<http://thesource/sectionlandingpage.asp?cat=588>

9. Performance monitoring

Details of how the council proposes to monitor the quality of goods/services supplied and that they meet the specified requirements:

Items available and delivered within the required timescales

Availability and response of technical support

Supply of spares

Goods of correct quality and quantity

Frequency of performance review meetings, and who should attend

Details of action to be taken to correct defective goods supplied

Details of how requests by the council should be dealt with

Management information/self monitoring arrangements that will assist in controlling the contract ie total spend by business unit/ department etc.

10. Pricing schedule

(Examples shown in a separate document in the procurement templates)