Objectives

- Learn about the process
- Study the highlights of the practice
- Gain insight into the most deliberated topics

Agenda

- Overview
- Introductions
- Process
- Panel Discussion
- Most Discussed Topics
- Key Points
- Panel Discussion
- Q&A
Global Best Practices: Specifications

• Provide:
  – Definitions
  – Context
  – Guidance

• Result:
  – Of collaboration
  – Content experts

Global Best Practices: Specifications Goals

• Useful and applicable guidance
• Elevate the procurement profession
Global Best Practices: Specifications
Why Update?

- Continuous improvement
  - Improved quality
  - Improved productivity
- Relevance - changing environment
- Mitigate risks
- Enhanced practical application

Poll #1

Why is it important to update best practices?

a. Continuous improvement
b. Ensure relevancy
c. Mitigate risks
d. Enhanced practical application
e. All of the above

Global Best Practices: Specifications
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Global Best Practices: Specifications
Process

- Discussion and consensus
  - Scope
  - Definition(s)
  - Objectives
  - Primary concepts
Global Best Practices: Specifications Process

- Framework is determined
- Initial vetting
  - Legislative and Position Committee
  - Review team
  - CIPS Advisory Board
- Feedback assessed and integrated

Global Best Practices: Specifications Process

- Final public review
- Feedback assessed and integrated
- Publication
- Webinar highlights new practice

Global Best Practices: Specifications Panel Discussion on the Process

- Discussion
- Disagreement
- Research
- Collaboration
- Discussion
- Consensus
Poll #2
What are the benefits of collaboration when writing a best practice document?
  a. Collective knowledge, skills, & resources
  b. Increased productivity
  c. Diverse perspectives
  d. Synergy (whole > parts)
  e. All of the above

Global Best Practices: Specifications
Most Discussed Topics
• Types of specifications
  – Design
  – Performance
    • Functional
    • Brand name
    • Brand name or equivalent

Poll #3
What terminology does your agency most commonly use to refer to the entity that submits the requisition or requirement?
  a. End user
  b. Client
  c. Department
  d. Customer
  e. None of the Above
Poll #4

What terminology does your agency most commonly use to refer to the item(s) being requested?

a. Good/Service
b. Commodity

Global Best Practices: Specifications Most Discussed Topics

- Consistency
  - NIGP Dictionary
  - Best practice
  - Foundation courses

Global Best Practices: Specifications Most Discussed Topics

- Commodity vs. good/service
- End user vs. client/customer
Global Best Practices: Specifications

Key Points

- Design specification
  - Advantages
    - Certainty
    - Objective evaluation
  - Disadvantages
    - May limit competition
    - May result in higher risk to entity
    - Loss of innovation
    - Time consuming

- Performance specifications
  - Advantages
    - Allow for supplier innovation
    - Allow for the latest products and technologies
    - Allow for corrective action
Global Best Practices: Specifications

Key Points

- Performance specifications
  - Disadvantages
    - Ensuring desired outcome meets performance metrics
    - Developing tests of performance
    - Difficult to compare offers

Writing Specifications

- Clear
- Concise
- Consistent
- Precise

- Identify minimum requirements
- Indicate which requirements are mandatory
- Use consistent language
  - Choose simple words
  - Be direct and concise
  - Use proper grammar and punctuation
Global Best Practices: Specifications
Writing Specifications

- Current and relevant specifications
- Avoid acronyms and clichés

Global Best Practices: Specifications
Writing specifications

- Offer evaluation
- Mechanism for changes
- Categorize
- Organize
- Reproducible test methods
- Consistent style and formatting

Global Best Practices: Specifications
Things to Avoid

- Multiple requirements
  - Example: The successful contractor will develop the software in accordance with the specifications and conduct a needs assessment **or vs and** interview the end users to determine their needs.

- Escape clauses
  - Avoid: The contract will be terminated **unless** the project timeline and critical milestone dates are met.
  - Fixed: The contract will be terminated **if** the project timeline and critical milestone dates are **not** met.
Global Best Practices: Specifications

Things to Avoid

- Run-on sentences
  - Avoid: The Contractor shall be directly responsible for the supervision conduct of all personnel assigned to the landscape maintenance of Apple Bus Company properties park and ride facilities the contractor shall be held responsible for any damages caused by the contractor’s service personnel.
  - Fixed: The Contractor shall be directly responsible for the supervision, and conduct of all personnel assigned to the landscape maintenance of Apple Bus Company properties, and park and ride facilities. The contractor shall be held responsible for any damages caused by the contractor’s service personnel.

- Mixing different types of requirements
- Speculative language

- Vague terms
- Wishful thinking
- Ambiguous punctuation
- Assumptions
- Over or under specifying
Global Best Practices: Specifications
Steps for Writing Specifications

- Meet with end users, clients, other stakeholders
- Seek external assistance
- Conduct thorough research
- Capability and capacity of the supply chain
- Choose the type of specification

Global Best Practices: Specifications
Steps for Writing Specifications

- Conduct analysis
  - Value analysis
  - Value engineering
  - Best value
  - Life cycle cost (LCC)
- Identify the supplier’s obligations
- Explain, clarify, and define

Global Best Practices: Specifications
Writing Specifications

- Essential characteristics
- Statement of intended use
- Methodology for determining performance
- Review specifications
Global Best Practices: Specifications

• Task Force Team Take Aways

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Global Best Practices: Specifications

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• YOU!

Global Best Practices: Specifications Closing Thought

This Global Best Practice provides the guidelines that should be considered when preparing specifications for solicitations and contract documents.

Questions?