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Purchasing Specification Development

Dear Reader:

The following document was created from the CTAS website (ctas.tennessee.edu). This website is maintained by CTAS staff and seeks to represent the most current information regarding issues relative to Tennessee county government.

We hope this information will be useful to you; reference to it will assist you with many of the questions that will arise in your tenure with county government. However, the *Tennessee Code Annotated* and other relevant laws or regulations should always be consulted before any action is taken based upon the contents of this document.

Please feel free to contact us if you have questions or comments regarding this information or any other CTAS website material.

Sincerely,

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Purchasing Specification Development

Reference Number: CTAS-930

In the article entitled "*Guide to Specification Writing*", the author (Kalms) describes a sample process (steps) to develop the specification. The process consists of two phases: a *development phase* and a *post development phase*. Within these two phases, Kalms outlined seven steps in developing the specification. Here are the seven steps:

Developmental Phase

Step 1: Planning and Analysis Foundation of a good specification.

Step 2: Consultation and Information Gathering Valuable information and advice may be obtained through discussions with other departments, agencies, or governments (federal, state, and local), companies, purchasing officers, finance officers, other users of the goods and services, and associations. The more complex the project, the greater the need for additional expertise.

Step 3: Writing the Specification Some writing tips:

- Use simple, clear language.
- Define terms, symbols and acronyms (include a glossary of terms).
- Be concise.
- Do not explain the same requirement in more than one section.
- Adopt a user friendly format.
- Number the sections and paragraphs.
- Discuss the draft and refine it.

Step 4: Vetting the Specification and Obtaining Approvals After writing the specification, ask a colleague who is unfamiliar with the requirement to critique it from a potential supplier's view.

Post Development Phase

Step 5: Issuing the Specification Distribute to potential offerors.

Step 6: Managing Amendments to the Specification Should a need arise to amend the specification during the "ITB or RFP" process, the amendment should be authorized by the person authorized to approve the amendment. The amended specification should be noted in the project files and all offerors or potential offerors must be given reasonable opportunity to offer to the new specification.

Step 7: Revising and Storing the Specification The specification should be reviewed at the end of the purchasing activity to ensure that it effectively defined the goods or services that were actually bought. If areas for improvement are identified, revise the specification with the benefit of hindsight.¹

¹Bryan Kalms, *Developing Specifications for Purchasing*, Queensland Government, Department of Public Works, July 2003, 7-10.

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