As stated in last month’s Purchasing Post, the purchase requisition (PR) form starts the purchasing process. Along with funding information, signature approving purchase, and recommended vendors, the PR provides the critical detail as to what exactly is needed. To obtain maximum benefit from competitive bidding it is essential that correct and complete specifications are provided which identify beyond questions, the specific item needed.

1.) Requested Quantity – self-explanatory

2.) Unit – insert the basic unit of measure (UOM). Try not to use the words like “box”, “case” or “lot”. They are vague measurements and different manufacturers may have different interpretations of what constitutes a case. “Each”, “gallons”, or “feet” are examples of more exact UOM’s.

3.) Description of Material or Service – generic summary of what is required. Brand names – In many cases it is appropriate to use brand names and identifying numbers (catalog or stock number) as part of the specifications. Purchasing will include the words "or equivalent" to avoid restricting the purchase to a particular brand or trade name. If a specific brand is necessary, the department must provide justification as to why that brand and only that brand will be considered. Few restrictions permit more competition and better prices.

Hints in writing specifications: 1.) Provide a range on the criteria if possible. Example: speed for a printer is listed as “8 pages/minute”. Does is have to be 8? Perhaps stating “speed of 7 to 9 pages/minute” provides for more competition. 2.) Don’t use the word “must” in specifications unless the requirement is an absolute necessity. If “must” is in the specification, then vendors will be eliminated from consideration if they cannot meet that specific requirement regardless of cost. Purchasing will remove the word “must” from specifications or require departments to provide further detail as to why the specification is critical.

Delivery – If arrival of product is critical, then the date due must be part of the specifications. Be aware that insisting on a certain date can eliminate potential vendors. Purchasing prefers the language “Product requested by mm/dd/yyyy. Vendors are to quote best delivery time possible; may be a factor in the award”. This gives the department latitude to see what is possible and weighs the benefits of a fast delivery over dollars saved.

Pre-Bid Conference or Questions Time Frame – If the material or service is complicated, the department may want to allow time for a dialogue, either in person (conference) or in writing (question/answer) so vendors have an opportunity to fully understand what is needed.

Trade-In – If department has equipment to trade-in and factored into the vendor’s bid, then describe the used item(s) and include a copy of the disposition of property form with the PR. Be advised that K-State reserves the right to keep the equipment and not trade it in if it is in the University’s best interest.

Shipping – special location or shipped over a certain time frame, the details need to be listed. The area on the PR does not provide enough space for a lengthy list of specifications. Departments are requested to attach additional specifications in Microsoft Word to the document in E-Forms. By supplying the information in Word, it allows Purchasing to copy and paste the info directly onto the bid request document and helps eliminate typos.

Departments are encouraged to include brochures, quotes, catalog pages, or any other helpful material. BE ADVISED! Brochures and vendors quotes are not to be submitted in lieu of specifications. These materials are good back-up information, but they provide info from the seller’s perspective, not the end-user. Departments are to separate the necessary features from the extraneous fluff when submitting specifications.