Writing Specifications for Services

Specification writing is the topic for this month’s “Post” as well. The February issue discussed specifications in general, basically keeping the information clear and to the point. In March, buying equipment was discussed in depth because of the nuances that need to be considered with equipment. This month covers specifications for services, e.g. lab work, consulting, janitorial, etc.

1. Scope of Project, usually a couple of paragraphs describing the service needed.
2. Term of agreement – how long will the service be needed? Renewals?
3. Specific assignments/methodology.
4. Expected delivery date and/or deliverables.
5. Frequency of review and progress updates.
6. Work products, results, and documentation.
7. Cancellation / termination clause / dispute resolution.
8. Liability issues, proof of insurance.
9. Is University / Department providing any support? What type and how often?
10. Primary contacts (lead persons from vendor and University dept.),
11. Changes to project are only in writing and between parties identified in resulting contract (see #10).
12. Qualities
   a. Company’s experience.
   b. References.
   c. Knowledge, skills, abilities.
13. Any proprietary issues? Access to sensitive information?
14. Fee for services
   a. Lump Sum, e.g. not to exceed amount. Still need breakdown on how invoices are issued and reconciled to the work received.
   b. Hourly Rate (depending on primary or subordinates providing actual work)
   c. Expenses (e.g. Travel, Meals, Phone, etc.) Recommend that a vendor absorbs costs into their standard fees. Expenses are unknown and can get expensive. If needed, agree to reimburse based on the State of Kansas rates.
15. Payment for services
   a. Partial up front (the University, as a rule, does not pay the full amount upfront)
   b. Phases
   c. Final (make sure to retain a portion of fee, to insure the project is completed and all reports, data, etc. are received.)
   d. Payment generally 30 days after receipt of proper invoice.

REMINDER: Professional service providers are an independent contractor, not an employee of the University.