

1000.13 SUBJECT: PROCEDURE FOR PREPARATION AND PROCESSING OF STANDARDS AND SPECIFICATIONS

:1 OBJECTIVE:

To establish a uniform policy for the preparation of specifications and standards used by Purchasing and Materials Management in the purchase of equipment, materials, and supplies.

:2 AUTHORITY:

This procedure amended by City Council September 15, 2003.

:3 DIRECTION:

The Director of Purchasing and Materials Management, as an appointed official, serves at the pleasure of, and receives direction from the Mayor through the General Administration Department Director.

:4 METHOD OF OPERATION:

A. Purpose

1. To assure that all necessary information needed by a supplier to furnish an item or service suitable to the City's needs is provided.
2. It is intended that specifications and standards are to assist in obtaining the best value for the City, and to encourage competitive bidding.

B. Forms

1. Purchase Specifications Form No. PMM-1 (Reference attached format for instructions)
2. Invitation to Bid Form

C. General Information

1. Responsibility
 - a. It is primarily the responsibility of the using or requisitioning department to furnish proper technical specifications and standards to be used in the purchasing function. Their approval of specifications shall be concerned primarily with technical provisions.
 - b. Since all purchase action is necessarily based on some specification or standard, it is reasonable that Purchasing & Materials Management should share in the responsibility of all specifications and standards used in the purchasing function.
 - c. Purchasing's approval of specifications and standards shall be concerned primarily with competitiveness, suppliers' management, manufacturing and distribution capabilities as they affect time of delivery of acceptable product.
2. Type of Specifications and Standards
 - a. This policy and procedure does not apply to construction contracts or specifications prepared by engineering consultants.
 - b. Performance - Wherein function and use of the I product needed are the basic definitions. (Use Form PMM-1)
 - c. Design - Wherein particular characteristics of the product and their arrangement are the basic definition. (Use Form PMM-1)

- d. Lists - Wherein actual products have been tested or examined and approved, prior to seeking prices. This is in essence a standard.
 - e. "Or Approved Equal" - Wherein the exact product of one or more suppliers or typical workmanship is designated as the level of quality desired, and the purchaser reserves the right to approve any other as equal or acceptable. It is the responsibility of the vendor to prove his product equal.
 - f. Questionnaire - Wherein the purchaser prepares a product information sheet which accompanies the request for prices and which each bidder must complete and return as a part of his bid.
 - g. Sample - Wherein the purchaser requires suppliers to furnish representative samples of products offered for his comparison and evaluation in determining the successful bidder.
3. Quality Level
- a. Specifications serve basically as a minimum quality level that is acceptable to the purchaser.
 - b. Minor deviations to the specifications may receive consideration by the using or requesting department and Purchasing & Materials Management. These deviations may provide for an increased or decreased quality level.
 - (1) Minor deviations such as life cycle costs which increase the quality level at a higher purchase price than the "low bid" can be considered if the total cost to the City is determined to be lower than that provided by the low bid.
 - (2) Minor deviations from specifications at a lower price than the low bid meeting all aspects of the specifications may be waived as an informality and considered if it is determined that the total cost is lower and the overall function is improved or not impaired.
 - c. Major deviations may be considered only prior to bid openings and all bidders shall be advised of same.
4. Standardization
- a. In developing specifications, multi-use standards must be encouraged and expensive specials eliminated when possible.
 - b. Standards will reduce inventory because they eliminate duplicate and near duplicate stock. Also, in stockless purchasing programs, suppliers are more willing to stock standard parts than specials.
 - c. Standard equipment, materials and supplies are available from many sources, often from stock, thereby reducing lead-times and assuring on-time delivery.
 - d. Standardization factors to be considered:
 - (1) Design
 - (2) Quality
 - (3) Interchangeability
 - (4) Sizes
 - (5) Grades
 - (6) Colors
 - (7) Methods of Manufacture

(8) Material and Chemical Characteristics

D. Instructions

1. Purchase Specifications, Form No. PMM-1 (attached)
 - a. The attached format shall be used in the preparation of specifications to be used in the purchase of equipment, materials, and supplies. It indicates information that could be included. If there are no requirements relative to section, merely shorten and re-number the sections.
 - b. When preparing specifications for a variety of items with common basic characteristics, it may be appropriate to prepare a basic specification and then add to or modify characteristics of the basic specification to specifically identify each item.
 - c. Purchasing approval is required on specifications as indicated herein.
 - d. Specification Number - User departments should number their specifications in numerical sequence preceded by department identification; e.g., Waste Water could use WW-1, WW-2, etc.
2. Register - A specification Register shall be maintained by the Standards and Specifications Engineer for reference purposes and to preclude duplication.
3. Purchasing & Materials Management shall maintain a file of all City purchase specifications for equipment, materials and supplies. City Departments shall be responsible for providing updated copies of specifications and standards to Purchasing & Materials Management.
4. Requisitioning departments shall be responsible for indicating proper purchase specifications headings and numbers on their purchase requisitions and the latest issuance or revision dates.

:5 FORMS:
As referenced herein.

:6 COMMITTEE RESPONSIBILITIES:
None.

:7 REFERENCE:
City Code Chapter 7. Procedure adopted by City Council March 3, 1986, Item 9, A-19; amended August 15, 1988, Item 14, A-13; amended July 26, 1993; amended April 17, 2000, Item 3-D; policy section # changed from 191.13, April 2004.

:8 EFFECTIVE DATE:
This procedure effective September 15, 2003.

Specification No. _____ Sheet _____ of _____

PURCHASE SPECIFICATION FOR (Name of Equipment, Material or Supplies)

1.0 SCOPE AND CLASSIFICATION

1.1 Scope

(Mention basic requirements included in the specification; e.g., functional, performance, material, testing, packaging, etc. Reference any qualified product or source list or domestic manufacture requirement when applicable.)

1.2 Classification

(Briefly describe the equipment, material or supplies and its application and use. Mention provisions of the specification where deviations may be considered.)

2.0 APPLICABLE SPECIFICATIONS

(List or refer to provisions of any trade, government or other specifications that are applicable.)

3.0 FUNCTIONAL REQUIREMENTS

(Itemize and describe in detail, features or functions you expect the equipment, materials or supplies to perform.)

4.0 PERFORMANCE REQUIREMENTS

(Itemize and describe in detail, any performance parameters that the equipment, materials or supplies must meet.)

5.0 MATERIAL REQUIREMENTS

(Itemize and describe any types of materials required including chemical compositions, construction or design features, components that must be used, finishes required, etc.)

6.0 SAMPLES, INSPECTION AND TEST REQUIREMENTS

(Itemize and describe or refer to any procedures to be followed by the supplier in establishing quality assurance. Also itemize and describe inspection or test procedures to be performed by the City of Orlando to determine product acceptability.

Include minimum inspection or test results that will be considered acceptable for supplier and for the City of Orlando testing. Include requests for any physical or chemical test reports or samples to be submitted with bid or shipments.)

7.0 ORDERING DATA

(Itemize by dash numbers, such variables as color, size, grades, etc., needed to order the material.)

8.0 OTHER REQUIREMENTS

(Itemize all other requirements, e.g.:

- Requests for descriptive data to be submitted by supplier or manufacturer,
- Warranty requirements,
- Packaging, labeling or marking requirements.)

Instruction Note:

In preparation of specifications, above sections are to be listed in numerical sequence and shall be subdivided as applicable by using paragraphs and subparagraphs, as follows: e.g.:

- Section 3.0
- First Paragraph 3.1
- First Subparagraph 3.1.1
- First Sub-subparagraph 3.1.1.1, etc.