

Step 18

Prepare the Technical Specifi- cations

The technical specifications of the Request for Proposal can usually be divided into the following parts:

- Scope of Work,
- Technical Requirements (for services supplied),
- Equipment Specifications (for goods supplied), and
- Supplemental Information.

In this section, the intent and contents of each of these divisions are discussed.

18.1 Scope of Work

The Scope of Work is a key document of the Request for Proposal in general, and the technical specifications in particular. Thus, draft it first because this helps in organizing and formulating the other bid request documents.

The Scope of Work document specifies the contracted quantities of equipment, scope of services, locations of work, and completion schedules. Typically it is divided into the following sections:

- Project Overview,
- Work Statements,
- Equipment Quantities,
- Schedules, and
- Responsibilities.

Price breakdowns requested and contract payment terms should correlate with the tasks, equipment quantities, and milestones stipulated in the Scope of Work.

Work Statements. The work should be broken down into two sets of specific tasks:

- those involved in providing goods, and
- those involved in providing services.

Each task should be keyed to specific sections that completely describe and qualify the work to be done or equipment to be supplied. Thus, tasks related to providing goods refer to equipment specification sections, and tasks that provide services refer to technical requirements sections (where appropriate terms of reference are stipulated).

Optional tasks should be identified as such. It should be clear whether it is a bidder's option to offer or not, or whether it is the purchaser's option to accept or not, with the offer being mandatory.

Equipment Quantities. Tables can be used to present quantities of equipment and documentation. Matrices can be used to show how equipment is to be distributed among the various locations.

Schedules. Contract milestones and target completion dates for phases (or areas) of the work should be stipulated. Dates for design reviews and dates for submission of documentation should be included. These may be referenced to contract milestones; for example, recommended acceptance procedures due 4 weeks prior to the start date of final acceptance.

Responsibilities. The document should delineate specific responsibilities for those involved in the contract: the purchaser, contractor, funding agency (if applicable), and engineer (if applicable).

Responsibilities at interface points must be clearly drawn. For example, where and how does the contractor interact with existing facilities or with facilities provided by other groups.

18.2 Technical Requirements

The Technical Requirement sections should provide terms of reference that describe fully the requirements of each service the contractor is asked to provide. Depending on the type of contract contemplated, technical requirements may need to be written for the following services:

- engineering,
- civil works,
- installation,
- spares and test equipment,
- documentation,
- training, and
- technical support.