CHAPTER 9

Specification and Statement of Work

Contents

- Specifications
- Statement of Work (SOW)

Introduction

- Specifications and SOW document:
  - Requirements
  - Deliverables
  - Expectations
- Ensures vendors understand what is being requested and allows them to determine whether they can meet PHA's needs and price them accordingly
- Authority: 2 CFR §200.319(a)

Specifications

- Specifications
  - Used to describe requirements
  - Detailed description of required materials, supplies, equipment, or construction work
  - Tells prospective offerors what PHA requires
- Types of Specifications
  - Functional or Performance
  - Design
  - Brand Name or Equal

Functional or Performance Specification

- Explains how item will function
- Contains no or little details about design or exact measurements

Design Specification

- Describes item in terms of specific tasks not as much about performance standard
- Typically contains detailed description with specific requirements:
  - I.e., dimensions, tolerance, materials, quality, method of installation, etc.

Brand Name or Equal

- Provides detailed requirements with respect to quality and performance associated with a certain brand
- Specification must not be used to restrict competition
- Procurement will state a brand name but must be followed by “or equal”
- Must describe in detail required elements of item so that offeror can identify and propose an “equal” product
- Brand name only used if there is no other way to describe an item
- Offerors should have opportunity to present products of other brands meeting specifications within a reasonable range of tolerance

Statement of Work

- Used to describe requirements for services
- Elements:
  - PHA objectives
  - Detailed work and task requirements
  - Deliverables and criteria for acceptance of work
  - Period of performance and delivery schedules
  - Reporting and compliance
  - Contact information for PHA administrator
  - Other: warranties, special skills, required licenses, testing procedures, etc.