

## CONTRACTING AND PURCHASING SERVICES POLICY MANUAL

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|  | <b>POLICY PUR 301-02</b>         |
|  | Section: Orders and Requisitions |
|  | Page 1 of 2                      |
|  | Responsible office: Purchasing   |
|  | Origination date: 07/01/1996     |
| <b>Subject: Specifications and Evaluation Criteria</b>                             | Effective date: 07/01/1996       |
| Source: University policy<br>ABOR 3-805  | Revision date:                   |

### PURPOSE

To establish responsibility for preparing specifications and evaluation criteria

### POLICY

#### **PUR 301-02-01: Preparation of Specifications**

Contracting and Purchasing Services and the requesting department share the responsibility specifications and evaluation criteria that will be included in a formal solicitation, however the requesting department is primarily responsible for developing the technical or performance specifications.

#### **PUR 301-02-02: Terms and Conditions**

Contracting and Purchasing Services is primarily responsible for the terms and conditions of the solicitation.

#### **PUR 301-02-03: Equipment/Installation Requirements**

The requesting department is responsible for determining any factors affecting the installation or use of equipment, including but not limited to:

1. Utilities availability
2. Space requirements
3. Floor loading capacity
4. Building accessibility

#### **PUR 301-02-04: Fairness**

Specifications must be written fairly and equitably. Specifications shall not be unduly restrictive or prejudicial to any supplier. Contracting and Purchasing Services shall update specifications when necessary to ensure fairness and maximum competition.

#### **PUR 301-02-05: Using Brand Name or Equal**

The descriptor “brand name or equal” may be used in specifications as a means of defining performance or other salient requirements of a procurement. When the descriptor “brand name or equal” is used, the specific features of the named brand that are required must be clearly identified so that it is clear what would make a competing product an “equal.”

Where brand name only is desired, the requestor shall justify in writing the reasons for specifying a particular brand name to the respective buyer. This document will be retained in the bid file.

#### **PUR 301-02-06: Evaluation Criteria**

Contracting and Purchasing Services and the requesting department share the responsibility of developing evaluation criteria for the responses to a solicitation.

#### **PUR 301-02-07: Submitting Specifications**

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The requesting department shall complete a requisition document in the Financial System send the specifications for the order to the appropriate buyer in Contracting and Purchasing Services, preferably in electronic format suitable for modification, referencing the requisition document number.

**PUR 301-02-08: Coordination with Capital Assets and Services (CAS)**

Department shall coordinate with CAS in cases where buildings or grounds will be affected by the procurement.

**PUR 301-02-09: Preparation of Specifications**

No person preparing or assisting in the preparation of specifications, plans or scopes of work shall receive any direct benefit from the utilization of those specifications, plans or scopes of work. The Procurement Director may waive this restriction if the Procurement Director determines in writing that this policy would not be in the University’s best interest. The determination shall state the specific reasons that the restriction has been waived.

**CROSS REFERENCE**

- [PUR 205-00](#) Prohibited Procurements
- [PUR 302-01](#) Departmental Purchase Orders
- [PUR 302-02](#) Purchasing Card Transactions