

## EXHIBIT 2.5-F

### Guidelines for Writing Descriptions, Statements of Work and Specifications

To enable the Procurement Department to obtain requested supplies and/or services, a complete, accurate and sufficiently detailed description of the supply or service is required. The type of details provided must be commensurate with the complexity of the proposed procurement. For additional guidance contact your division office or the Procurement Department.

#### A. "Off the Shelf" commercially available supplies

For commercially available off-the-shelf-type supplies, it is necessary to provide the following type of detail to accurately describe the item(s):

1. Item name, (noun, adjective)
2. Manufacturer or supplier model/part/catalog number
3. Category code supplier or service
4. Desired quantity and unit of measure (ten each or one box of ten)
5. Delivery date required
6. Estimated unit price
7. Estimated extended price

Example:

Manufacturer/Supplier: Varian

item	Item description	model/part/catalogue no.	category code	qty	u/m	delivery date required	estimated unit price	estimated extended price
1.		951-5098		1	each	4/10/96	\$195.00	\$195.00
2.		KC-16-SV		10	each	4/10/96	5.00	50.00
3.		KRC-1625-S		2	each	4/10/96	36.00	72.00

Purchase descriptions should be modified by the phrase *or equal*, in those cases where a particular manufacturer's product is not critical to the application.

## EXHIBIT 2.5-F (CONTINUED)

To the maximum extent practicable, requisitioners are responsible for identifying candidate items for recycled products and revising specifications to include recycled materials. Special instructions should be provided to the buyer/contract specialist to explain unusual circumstances.

### B. Commercially available services

For commercially available services, provide a noun description and a primary adjective description for the service desired and provide additional details under detail comments or by attaching notes to the requisition.

Example:

item	Item description	model/part/ catalogue no.	category code	qty	u/m	delivery date required	estimated unit price	estimated extended price
1.				1	Lot	4/10/96	2,850.00	\$2,850.00
Russian Language Beginning: 60 hours total @ 3hour sessions twice per week for 10weeks								
2.	book	training	category code	35	each	4/10/96	750	\$2,625.00

### C. Statements of Work

A clear, concise and complete statement of work is essential for sound procurement. The statement of work is used to communicate requirements to suppliers and is included in the solicitation, and incorporated into the resulting contract or purchase order.

Statements of work should state the actual minimum needs of the Laboratory and must be tailored to attain the desired degree of flexibility for supplier performance and creativity, both in submitting proposals and in contract performance. The degree of flexibility must be controlled in the sense that a statement of work that is too broad may be unpricable or not legally enforceable. Conversely, a statement of work that is too narrow may unduly restrict competition or the efforts of the supplier and result in the need for contract modifications.

## EXHIBIT 2.5-F (CONTINUED)

The statement of work is the principle document against which prospective suppliers proposals will be evaluated and will serve as the starting point for development of technical evaluation criteria (reference Guidelines for Preparation of Technical Evaluation Criteria, Exhibit II-D-I) for a competitive procurement, and the development of the independent cost estimate (reference Guidelines for Preparation of an Independent Cost Estimate, Exhibit II-D-H).

A typical statement of work will be given a short but explicit title, and may be divided into six sections as follows:

1. Introduction (objectives) and background information
2. Scope (the overall or various phases; design, develop, fabricate, test and deliver)
3. Applicable documents and or specifications (if included or referenced)
4. Technical tasks and quality assurance
5. Reports, data and deliverables
6. Other special considerations

Requisitioners are responsible for identifying candidate items for recycled products and developing specifications to include recycled materials to the maximum extent practicable.

Statements of work do not normally include names and phone numbers of Laboratory personnel, unnecessarily restrictive brand names, price, or duplicative/conflicting information in relation to the solicitation terms and conditions.

For additional guidance in the preparation of a statement of work, consult your division office or the Procurement Department.

### **D. Technical Specifications and/or Drawings**

For items that are to be fabricated, or accepted by the Laboratory based on performance characteristics, details are usually presented in the form of requirements.

A detailed design specification should be used to set forth precise measurements, tolerances, materials, in-process and finished product tests, quality assurance, inspection requirements, and other specific information.

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A performance specification should be used to set forth operational characteristics for an item. In such specifications, the design, measurement, and other details are not stated as long as the performance requirement is met. This is the preferred Laboratory approach in preparing specifications.

Requisitioners are reminded to incorporate the use of environmentally preferable and recycled products into all specifications. This practice implements U.S. Environmental Protection Agency (EPA) recommended minimum content standards on the following designated items:

1. Paper and paper products
2. Vehicular products
  - a. Engine coolants
  - b. Re-refined lubricating oils
  - c. Retread tires
3. Construction Products:
  - a. Structural fiberboard
  - b. Laminated paperboard
  - c. Carpet
  - d. Floor tiles
  - e. Patio blocks
  - f. Building insulation products
  - g. Cement and concrete containing
    - (1) coal fly ash
    - (2) ground granulated blast furnace slag
4. Transportation products
  - a. Traffic cones
  - b. Traffic barricades
5. Park and recreation products
  - a. Playground surfaces
  - b. Running tracks
6. Landscaping products
  - a. Hydraulic mulch
  - b. Yard trimmings compost

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7. Non-paper office products
  - a. Office recycling containers
  - b. Office waste receptacles
  - c. Plastic desk-top accessories
  - d. Toner cartridges
8. Binders
9. Plastic trash bags
10. Other items as designated by the EPA subsequent to the issuance of this document

For additional information, contact the Procurement Department or the Environmental Management Organization.

Samples of specifications may be obtained from your division office or from the Procurement Department.