# BUILDING A SOR

1.Background of the department:

* Why does the department need the goods? What, When? Where?
* State the name of the client organization acquiring the services or good and provide a brief summary of the department function and mandate.
* Why do you need this good? Contract renewal? Replace old equipment? Increase capacity of research? Etc.
* WHAT do you need...WHEN and WHERE do you need it delivered?

2. What are the Minimum PERFORMANCE Specifications:

These specifications need to be:

* Measurable (quantifiable)
* Based on needs vs wants
* Based on operation requirements vs. “What is in the brochure”
* Expressed in “ranges” or minimum /maximums.
* Encourage competition.
* Verified during the evaluation.

3. What are the General Specifications?

* What are the dimensions?
* Will it fit through the door?
* Are there weight restrictions – load bearing capacity.
* Any other restrictions with transportation, delivery or installation

4. What are the Standards, Certifications, regulations

* Questions to ask- where is the equipment being plugged into? You need to clearly identify any documentation required.
* Any Quality Assurance standards that need to be met? (ISO 9001)
* Any Environmental standards? (ISO 14001)

5. Are there software specifications?

* Is there software or hardware included?
* Are there performance specifications?
* What time of functionality?
* User friendly needs to be defined.
* Is there compatibility with existing software and hardware?
* If so Compatibility needs to be clearly identified.

6. Technical and Support Warranty

Types of questions to address:

* What happens if the equipment breaks down during operation?
* What type of support do you need? On site? Remote? Length of warranty?
* Exchange or spare parts?
* Is there an acceptable level of down time for the equipment that needs to be repaired?
* What is an acceptable level of response time?
* Call centre support?
* Technical manuals or videos? Both official languages?

7. Delivery, Inspection, Installation, testing, training

* After the equipment is delivered, then what?
* Does the equipment need to be unpacked?
* Who is doing the installation?
* Who will test the equipment to ensure it is working?
* Who from the client department is the inspection authority?
* If equipment delivery is on March 31st. When does installation need to be done?
* Do employees need to be trained on the equipment? What type of training? WebEx? Video? On-site training? Length of training? When does training need to completed by?

8. Quality Insurance

* How do we address quality of the supplier?
* Supplier must be an Authorized Value Reseller of the equipment they are offering.
* Should the manufacturer have an International Standard to ensure consistency of manufacturer of the product?
* Be very clear if the vendor will be responsible for providing a “turn-key” system which will include installation, testing and commissioning.
* Equipment offered must be “new” and not “demo” units…and be readily available in the market place.

9. Optional Goods

* Can we build in option to purchase additional equipment at a later date?