

DECISION DOCUMENT
Specification Writers' Style Guide

Problem statement: The Standard Specifications and Standard Special Provisions (Standards) lack clarity and consistency. Currently there is no guidance or documentation of business rules for writing specifications that contributors to the specifications can and should follow.

Recommendation: Establish and require use of a *Specification Writers' Style Guide* (Guide).

Fiscal impact: Potential savings in reduced effort to develop, revise, and maintain the Standards, and fewer disputes during contract administration. (The first time the Standard Specifications are published using the Guide, there will be additional costs compared to simply updating.) Printing the guide will cost an estimated \$50,000. Fifty specification developers will require 80 hours of training each to gain proficiency in applying the Guide for an approximate cost of 2.2 PY.

Policy impact: None. No new or revised policies are required for implementation.

Organizational impact: None.

Risk(s): None.

Proposed implementation schedule: Implementation will coincide with the next edition of the Standard Specifications and Standard Special Provisions (separate decision document). Selected features of the Guide can be implemented immediately where appropriate.

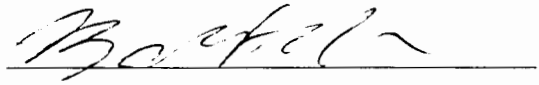
APPROVAL RECOMMENDED BY:



ROBERT L. BUCKLEY
Chief
Division of Engineering Services

12/5/03
Date

APPROVED BY:



BRENT FELKER
Chief Engineer

12/5/03
Date

Attachment(s)

Decision Document Attachment

1. **Problem statement:** The Standard Specifications and Standard Special Provisions (Standards) lack clarity and consistency. Currently there is no guidance or documentation of business rules for writing specifications that contributors to the specifications can and should follow.
2. **Recommendation:** Establish and require use of a Specification Writers' Style Guide (Guide).
3. **Background:**
 - 3.1 Contracts based on unclear and inconsistent Standards result in higher bids. Lack of clarity and consistency in the Standards results in impaired communication between contractors and field engineering staff, leading to disputes. Contract language that is unnecessarily complicated acts as a barrier to small businesses bidding on Caltrans projects.
 - 3.2 Division of Construction contracted with Trauner Consulting, Inc. to re-write Section 8 of the Standard Specifications. In preparation for the re-write, Trauner requested the Department's guidelines for specification writing to ensure consistency. The Department has some specification training materials but no specific guidelines. Trauner provided an example of the State of Wyoming's style guide, and suggested a similar document be developed for use in California. DES-Office Engineer and Construction agreed to the value of a California Specification Writers' Style Guide, and Construction issued a task order for its development.
4. **Alternative:** "No action alternative..."
 - 4.1 This alternative is not desirable because Standards will continue to be developed and revised without language, style and format guidance. Standards will continue to be developed inefficiently (requiring multiple revisions) and final versions could still be unclear and inconsistent with other Standards.
5. **Alternative (Recommended alternative):**
 - 5.1 Establish and require use of a *Specification Writers' Style Guide* (Guide). The guide establishes the business rules that will lead to clear and consistent specifications, and make development and revision of specifications more efficient. Contractors, field personnel, and small businesses will benefit from clear and consistent specifications.
 - 5.2 Fiscal impact: Potential savings in reduced effort to develop, revise, and maintain the Standards, and fewer disputes during contract administration. (The first time the Standard Specifications are published using the Guide, there will be additional costs compared to simply updating.) Printing the guide will cost an estimated \$50,000. Fifty specification developers will require 80 hours of training each to gain proficiency in applying the Guide for an approximate cost of 2.2 PY.
 - 5.3 Policy impact: None. No new or revised policies are required for implementation.
 - 5.4 Organizational Impact: None.
 - 5.5 Risk(s): None.

5.6 Proposed implementation schedule: Implementation will coincide with the next edition of the Standard Specifications and Standard Special Provisions (separate decision document). Selected features of the Guide can be implemented immediately where appropriate.

6. Performance measures:

6.1 What is the deliverable? A *Specification Writers' Style Guide* and a set of *Standard Specifications* and Standard Special Provisions that are clear and consistent.

6.2 How can we track and evaluate effect of the change? Comparison of future bids, claims, and disputes with the past.

7. Contact person:

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