

## Appendix B4

## Personal Service Contract File Checklist

**Note** – Use Not Applicable (NA) to mark those items that do not pertain to a given contract.

Date	By	Procedure or Document	
<b>Process Checklist</b>			
		A	Document need and identify personal service
		B1	Project is reasonably related to a public works project (if, so it is not a personal service)
		B2	Project is not reasonably related to a public works project
		C	Exception from competitive solicitation documentation <input type="checkbox"/> Sole source <input type="checkbox"/> Emergency
		D	<i>Does Not Apply To Documentation</i> (RCW 53.19.060) List reason
		E	Initial order of magnitude cost estimate <input type="checkbox"/> More than \$200,000 <input type="checkbox"/> Less than \$500,000
<b>Solicitation Procurement Checklist</b>			
		F1	Documentation of formal competitive solicitation process if more than \$200,000
		F2	Documentation of informal competitive solicitation process, including request for proposals from multiple firms, if more than \$50,000 but less than \$200,000
		F3	Documentation of process followed if less than \$50,000
		G	Procurement selection rationale (e.g. Roster, RFQ, RFP, State contract)
		H	RFQ/RFP and addenda (formal or informal)
		I	Cost estimate
		J	Evidence of sources solicited (e.g. advertisement, email)
		K	Proposals
		L	Evaluation worksheet(s)
		M	Reference check documentation
		N	Recommendation to award with selection rationale
		O	Internal approvals, including Port Commission if needed
		P	Notice of selection to other proposers
		Q	Signed agreement
<b>Contract Administration Checklist</b>			
		R	Deliverables – or reference to their location
		S	Progress invoices
		T1	Contract amendments due to scope changes and approvals as needed
		T2	Contract amendments due to price adjustments and approvals as needed
		U	Final cost summary and report to Commission/Director, if needed
		V	Evaluation of contract process and/or consultant, if done

