PUBLIC KNOWLEDGE

Procuring Professional Services Checklist

For:

Drinking Water State Revolving Fund (DWSRF)

Washington State Department of Health (DOH)

October 2025

Purpose

This checklist summarizes the steps in a DWSRF project specific to professional services procurement. You can follow this list to track where you are in the process and what comes next. Each task includes a link for more information. You can use the comment column to make notes and check off items when they are complete.

DWSRF Professional Services Checklist

	Task	Comment	Done
	Identify		
1.1	Review your DWSRF approved scope of work. Create a list of required professional services. Use the list to write your bid advertisement.		☐
	Draft		
2.1	Write a bid advertisement for professional services that states the general scope and nature of the project work. Include a contact for additional information. **For additional information on drafting a bid**: Review the Procurement 101 training deck.		☐
	Review		
3.1	Send a copy of your bid advertisement to your DWSRF Contract Manager for approval. DWSRF Customer Loan Handbook Reference: Section 7		☐

	Task	Comment	Done
3.2	Finalize the bid advertisement. Choose a general circulation newspaper to publish the advertisement in. **Note**: For loans under $300,000, include either a formal published advertisement or a consultant roster to satisfy the requirement. **Note:** Borrowers already under contract with an engineering or architectural consultant may continue to use that consultant for their project if they were originally hired through a competitive process. **Note:** This step is not required if assigned an engineering firm from DWSRF Planning & Engineering Technical Assistance. DWSRF Customer Loan Handbook Reference: Section 5 **Note:** For effective record keeping and reporting, file a copy of all records related to the procurement method used, the contract type, reasons for selecting or rejecting bidders, and the basis for the agreed upon contract cost. Keep a copy of the advertisement published in the newspaper and records of Disadvantaged Business Enterprises you invited to submit proposals or qualifications.		☐
	Publish		
4.1	Once approved by your DWSRF Contract Manager, publish your request for professional services in a general circulation newspaper at least once a week for two weeks. Allow 14 calendar days from the last publication date for respondents to prepare and submit their proposals. **Note**: This step is not required if assigned an engineering firm from DWSRF Planning & Engineering Technical Assistance. DWSRF Customer Loan Handbook Reference: Section 5		☐

	Task	Comment	Done
	Prepare		
5.1	Prior to reviewing bids, document a system for reviewing proposals and statements of qualifications submitted in response to your published advertisement. **Note**: The evaluation system must include selection criteria established prior to solicitation, evaluation of cost and rates, and be thorough, uniform, and well documented. **For additional information on selection criteria:** Review the Procurement 101 training deck.		☐
5.2	Collect all received bids and determine a review schedule to follow. Stick to the review system you created in step 5.1 of this checklist.		☐
	Evaluate		
6.1	Open and review all bids. Use your review system to maintain a fair process. Document your scoring and comments along the way.		☐
6.2	Select the firm or business that is most advantageous to your project. Document why you selected the chosen firm or business and indicate why it is the most qualified for the job. **Note**: You may use the Request for Proposals method to choose the firm with the most advantageous proposal OR use the Request for Statement of Qualifications method to find the most qualified firm. **Note**: If you use the Request for Statement of Qualifications method, you must conduct contract negotiations to determine the fair and reasonable price of services.		☐

	Task	Comment	Done
	For additional negotiation information: Review the Procurement 101 training deck.		
6.3	Check the Federal Excluded Parties List (SAM.gov) for clearance on professional service providers (engineers, architects) before signing contracts (even if your professional service is currently under contract). Send copies of website search results to your DWSRF Contract Manager. DWSRF Customer Loan Handbook Reference: Section 5		☐
	Contract		
7.1	Develop contracts according to all applicable state and federal requirements. Contracts should include the following provision categories: 1. General Requirements 2. Scope of Services 3. Method of Compensation 4. Performance Monitoring Measures. Refer to the DWSRF Customer Loan Handbook for additional detail to include in the provisional categories. DWSRF Customer Loan Handbook Reference: Section 5		☐
	Monitor		
8.1	Establish a system to monitor the performance of your contracted provider. Utilize your SOW as a guide throughout the lifecycle of your project.		☐
	Documentation and Completion		

	Task	Comment	Done
9.1	Document all decisions made, providing required updates to your contract manager throughout the lifecycle of the project through completion.		☐