

EXECUTIVE CHOICES

Government Contracting Readiness Library

*Editable worksheets, checklists, templates, and official-source links
for the full opportunity-to-closeout lifecycle*

IMPORTANT USE NOTE

This is a comprehensive starter library—not a promise that every form for every procurement is included. The controlling solicitation, amendments, agency instructions, current FAR/DFARS clauses, and current official forms always govern. Use qualified legal, tax, accounting, cybersecurity, and HR professionals when appropriate. Do not place TIN, banking, passwords, or other secrets in shared copies.

Prepared for Executive Choices clients and subscribers

Version 1.0 • August 2026

1. How to Use This Library

Save a working copy for each entity and a separate pursuit folder for each solicitation. Assign an owner and due date to every open item.

Phase	Use these tools	Proof to retain
Get ready	Registration checklist, entity profile, NAICS worksheet, capability statement	SAM confirmation, licenses, insurance, certifications, approved profile
Find and qualify	Search profile, target-agency worksheet, opportunity intake, bid/no-bid scorecard	Saved notice, amendments, decision record
Build the response	Compliance matrix, question log, proposal outline, pricing/CLIN worksheet	Approved drafts, quotes, review record, submission receipt
Team and source	Partner due diligence, RFQ, workshare matrix, subcontractor onboarding	Signed agreements, responsibility matrix, insurance/certification evidence
Perform and close	Kickoff, deliverables, quality, invoice, change, risk, closeout trackers	Accepted deliverables, invoices, modifications, closeout and past-performance file

Suggested electronic folder structure

- ☐ 01 Entity and registrations
- ☐ 02 Capabilities and past performance
- ☐ 03 Opportunities and bid decisions
- ☐ 04 Solicitation and amendments
- ☐ 05 Teaming and vendor quotes
- ☐ 06 Technical and management proposal
- ☐ 07 Price proposal
- ☐ 08 Reviews and approvals
- ☐ 09 Submission receipt
- ☐ 10 Post-award and closeout

2. Entity Registration and Readiness

- ☐ Legal business name, physical address, formation jurisdiction, and incorporation records match across systems.
- ☐ Unique Entity ID is assigned and SAM.gov entity registration is active.
- ☐ CAGE/NCAGE information is correct when applicable.
- ☐ Taxpayer name/TIN validation, EFT banking, and remittance information are current in the authorized system.
- ☐ Points of contact include backups; email and phone details are monitored.
- ☐ Representations and certifications have been reviewed and updated at least annually and after material changes.
- ☐ Business size and socioeconomic representations are supported by records.
- ☐ Required federal, state, local, professional, facility, and trade licenses are current.
- ☐ Insurance limits can meet anticipated contract requirements.
- ☐ W-9 is completed only on the current official IRS form and transmitted securely when requested.
- ☐ Renewal dates are calendared 60, 30, and 15 days before expiration.

Entity profile

Legal name: _____

DBA: _____

UEI: _____

CAGE/NCAGE: _____

SAM expiration: _____

Primary contact: _____

Backup contact: _____

Website: _____

Credential / registration	Number or status	Expiration	Owner	Evidence location

3. NAICS, Size Standards, and Certification Worksheet

NAICS	Description	Size standard	Entity size	Revenue / employees evidence	Priority

Certification readiness

Program	Potentially eligible?	Application/status	Renewal	Evidence / gap
Small business				
8(a)				
HUBZone				
WOSB / EDWOSB				
SDVOSB / VOSB				
State/local certification				

- ☐ Verify each size standard against the current SBA table for the solicitation's assigned NAICS.
- ☐ Retain ownership, control, financial, employee, residency, and certification evidence applicable to each representation.
- ☐ Do not claim a certification until the responsible system or authority confirms it.

4. Capability Statement Builder

Customer problem we solve:

Primary differentiator: _____

Core service 1: _____

Core service 2: _____

Core service 3: _____

Geographic reach: _____

Primary NAICS: _____

Secondary NAICS: _____

UEI / CAGE: _____

Contact and website: _____

Past-performance proof points

Customer / project	Scope and relevance	Contract value / period	Measurable result	Reference available?

One-page quality check

- ☐ Names the target agency/customer and aligns to its likely mission need.
- ☐ Uses specific outcomes rather than unsupported superlatives.
- ☐ Includes relevant NAICS, UEI, CAGE, certifications, contract vehicles, and contact information.
- ☐ Contains no sensitive customer, pricing, TIN, or banking data.
- ☐ Is readable at normal zoom, proofread, accessible, and exported to PDF with a clear filename.

5. Market Research and Opportunity Search Profile

Target	Agency / office	Mission need	Forecast / vehicle	Contact / event	Next action

Reusable search profile

Primary keywords: _____

Exclusion keywords: _____

NAICS codes: _____

PSC/product service codes:

Set-asides: _____

Notice types: _____

Place of performance: _____

Value range: _____

Response horizon: _____

Target agencies: _____

- ☐ Save the authoritative notice and all attachments locally.
- ☐ Record the notice ID, solicitation number, posting date, due date/time zone, and contracting office.
- ☐ Check amendments and Q&A before every review and immediately before submission.
- ☐ Never rely only on an alert email or summary page for requirements.

6. Opportunity Intake and Bid / No-Bid Decision

Field	Answer
Notice / solicitation number	
Agency / office	
Title / requirement	
NAICS / PSC / size standard	
Set-aside / competition	
Place of performance	
Contract type / period	
Questions due	
Proposal due, time zone, method	
Incumbent / contract history	
Evaluation factors	
Attachments / amendments	

Bid / No-Bid Scorecard

Bid factor (score 0-5)	Weight	Score	Weighted	Evidence / action
Customer and requirement fit	5			
Past performance relevance	4			
Technical and staffing capacity	4			

Bid factor (score 0-5)	Weight	Score	Weighted	Evidence / action
Price competitiveness	4			
Team / vendor coverage	3			
Compliance and schedule feasibility	5			
Strategic value and win probability	3			

Decision and date: _____

Approver: _____

Top win themes: _____

Top risks / conditions: _____

7. Solicitation Control Center

Amendment and deadline log

Item	Published	Required action	Owner	Due	Complete / evidence

Questions / RFI log

ID	Requirement / citation	Question	Submitted	Agency response	Proposal impact

- ☐ Confirm page limits, font/margin rules, file format, naming, signatures, volumes, and submission portal/email.
- ☐ Separate mandatory, rated, informational, and post-award requirements.
- ☐ Resolve conflicts through the authorized question process; do not invent requirements.

8. Proposal Compliance Matrix

ID	Solicitation citation	Requirement / instruction	Response location	Owner	Status / evidence

- ☐ Trace every instruction, evaluation factor, deliverable, representation, clause-driven response, and attachment.
- ☐ Use exact solicitation language in the requirement column; paraphrase only in working notes.
- ☐ Require independent red-team verification before final submission.

9. Proposal Writing and Review Pack

Recommended response outline

- ☐ Cover letter and signed transmittal
- ☐ Executive summary and customer outcomes
- ☐ Technical approach by task/deliverable
- ☐ Management, governance, communication, and escalation
- ☐ Staffing, key personnel, recruiting, retention, and surge
- ☐ Schedule, transition, milestones, and dependencies
- ☐ Quality-control / surveillance approach
- ☐ Cybersecurity, privacy, safety, and records controls as applicable
- ☐ Past performance and references
- ☐ Price volume, assumptions, exceptions, and required representations
- ☐ Required forms, attachments, and acknowledgments

Section drafting card

Requirement / evaluation factor:

Customer outcome: _____

Approach and sequence: _____

Responsible role: _____

Tools / controls: _____

Proof / past performance:

Risk and mitigation: _____

Compliance evidence: _____

Color-team review

Review	Purpose	Reviewer	Date	Decision / required changes
Pink	Storyboard, compliance, win themes			
Red	Evaluator-style draft review			
Gold	Executive, price, and risk approval			
White glove	Final files and submission mechanics			

10. Pricing, CLIN, and Quote Coordination

CLIN / item	Description	Qty	Unit	Unit price	Extended	Basis / source

Price assumptions and approvals

- ☐ Labor categories, productive hours, escalation, indirect rates, fees, travel, ODCs, freight, tax treatment, and contingency are documented.
- ☐ Vendor quotes use matching units, quantities, specifications, delivery locations, validity periods, and exclusions.
- ☐ Math, rounding, cross-volume totals, and CLIN extensions are independently checked.
- ☐ Price-to-win judgment and margin approval are documented without exposing confidential data broadly.
- ☐ Final price matches every electronic portal field and signed form.

Approval	Name	Date	Decision / limit
Estimator			
Finance			
Executive			

11. Vendor RFQ Template

Subject: Quote request — [SOLICITATION / REQUIREMENT] — response requested by [DATE / TIME ZONE]

Hello [VENDOR CONTACT],

Executive Choices is evaluating support for the requirement below. Please provide a written quote using the requested units and identify all assumptions, exclusions, lead times, and quote validity.

Agency / customer: _____

Solicitation / notice: _____

Place of performance: _____

Scope / specification: _____

Quantity / units: _____

Period / delivery: _____

Required licenses / insurance / certifications:

Quote due / submission contact:

Required quote response

- ☐ Legal business name, address, contact, UEI/CAGE if applicable, and business size
- ☐ Itemized price by requested line/unit and total
- ☐ Delivery or mobilization schedule; assumptions, exclusions, substitutions, and validity period
- ☐ Warranty, quality, staffing, safety, and escalation approach as applicable
- ☐ Confirmation of required insurance, licenses, security, and flow-down readiness
- ☐ Consent before use of company name, quote, or past performance in a government response

Thank you,

[NAME / TITLE]

Executive Choices

LDS@ExecutiveChoices.net | (804) 944-6071

12. Teaming and Subcontractor Due Diligence

Review item	Verified?	Evidence / source	Risk / action	Owner
Legal identity, registration, good standing				
Capabilities and relevant past performance				
Key personnel and capacity				
Licenses, insurance, safety, and quality				
Exclusions / responsibility / integrity checks				
Cybersecurity, privacy, CUI, and system access				
Financial and delivery risk				
Conflicts, exclusivity, OCI, and non-solicitation concerns				

Agreement issues for qualified counsel

- ☐ Purpose, covered opportunity, term, confidentiality, data handling, and permitted disclosures
- ☐ Prime/sub relationship, proposal roles, workshare, exclusivity, and customer contact rules
- ☐ Pricing ownership, proposal costs, intellectual property, representations, certifications, and flow-down obligations
- ☐ Award contingency, subcontract negotiation, termination, disputes, publicity, and record retention
- ☐ No promise of award, workshare, or subcontract beyond the written agreement

13. Workshare and Responsibility Matrix

Task / deliverable	Prime owner	Partner / sub	Workshare %	Inputs due	Acceptance / evidence

Subcontractor onboarding

- ☐ Signed subcontract and applicable flow-downs
- ☐ Approved scope, CLINs, rates, ceilings, invoice format, and payment terms
- ☐ W-9 and EFT collected through secure authorized channels
- ☐ Insurance, licenses, certifications, exclusions, and responsibility evidence
- ☐ Background, badging, facility, safety, training, cybersecurity, CUI, and equipment requirements
- ☐ Named delivery manager, reporting cadence, quality measures, records, escalation, and change control
- ☐ Consent and approval requirements for lower-tier subcontractors

14. Submission Readiness Checklist

- ☐ Latest solicitation and every amendment reviewed; required acknowledgments completed.
- ☐ Compliance matrix is complete and independently verified.
- ☐ All volumes meet page, font, margin, format, filename, and file-size rules.
- ☐ Technical, management, staffing, schedule, quality, past performance, and price sections agree.
- ☐ All required signatures, certifications, forms, attachments, resumes, references, and letters are present.
- ☐ No tracked changes, comments, hidden text, broken links, metadata concerns, or inaccessible scans remain.
- ☐ Pricing totals, CLINs, portal fields, assumptions, and signed price forms reconcile.
- ☐ Authorized signer and final approver have approved the exact submission files.
- ☐ Portal/email access is tested; submission begins early enough for recovery.
- ☐ Confirmation, timestamp, final files, and correspondence are retained.

Final file	Version / hash	Approved by	Submitted	Receipt / evidence

15. Post-Award Kickoff and Performance Controls

Kickoff agenda

- ☐ Contract, statement of work, CLINs, funding, period, options, and authorized direction
- ☐ Government and contractor roles, contacts, communication, and escalation
- ☐ Deliverables, due dates, formats, acceptance, quality measures, and surveillance
- ☐ Staffing, transition, access, badging, facilities, equipment, safety, security, privacy, and CUI
- ☐ Invoices, supporting records, payment platform, subcontractor controls, travel, and approvals
- ☐ Risks, assumptions, dependencies, changes, modifications, disputes, and records retention

Deliverables tracker

Deliverable	Contract citation	Owner	Due	Submitted	Accepted / comments

Risk / issue / change log

ID	Type	Description	Impact / probability	Owner / action	Status / date

16. Quality, Invoice, and Modification Controls

Quality-control plan outline

- ☐ Performance standard and acceptable quality level for each output
- ☐ Inspection method, frequency, sample, reviewer, record, and corrective action
- ☐ Customer feedback and complaint handling
- ☐ Nonconformance, root cause, corrective/preventive action, and verification
- ☐ Subcontractor quality surveillance and escalation

Invoice checklist

- ☐ Invoice period, contract/order, CLIN, funding, quantities, rates, totals, and cumulative amounts match the contract.
- ☐ Accepted deliverables, time, travel, receipts, and other required support are attached.
- ☐ Subcontractor invoices were reviewed under the subcontract and applicable terms.
- ☐ Invoice is submitted only through the authorized method and by an authorized person.
- ☐ Rejection, correction, resubmission, approval, and payment dates are tracked.

Modification / direction	Date	Authorized by	Scope / cost / schedule effect	Action / status

17. Contract Closeout and Past-Performance File

- ☐ All deliverables accepted and discrepancies resolved.
- ☐ Final invoice, release, assignment/refund, property, security, access, patent/royalty, and classified/CUI actions completed as applicable.
- ☐ Subcontractors and vendors closed; final payments, releases, property, records, and disputes documented.
- ☐ Excess funds, credits, travel, and indirect-rate matters resolved as applicable.
- ☐ Government-furnished property/information returned, transferred, or dispositioned.
- ☐ Records retained for the required period under the contract and applicable rules.
- ☐ Past-performance evaluation monitored; factual corrections and comments submitted within the allowed period.
- ☐ Reference contact consent, performance metrics, outcomes, lessons learned, and approved case-study language retained.

Closeout item	Owner	Due	Completed	Evidence location / notes

18. Compliance Screening Checklist

Area	Screening questions	Applicability / clause	Owner / action
Responsibility and exclusions	Is the entity responsible, eligible, financially capable, ethical, and able to perform?		
Cybersecurity / CUI	Will systems process FCI/CUI? Which security, incident, assessment, and flow-down duties apply?		
Section 889 telecom	Do prohibited equipment/service representations, reporting, or supply-chain checks apply?		
Labor	Which wage determinations, service/construction labor standards, EEO, veterans, disability, or sick-leave rules apply?		
Domestic sourcing	Do Buy American, Trade Agreements, specialty metals, or other origin rules apply by item?		
Subcontracting	Are consent, competition, limitations on subcontracting, flow-downs, or a subcontracting plan required?		
Organizational conflicts	Could access, prior work, impaired objectivity, or unequal information create an OCI?		

Area	Screening questions	Applicability / clause	Owner / action
Data / IP / privacy	What rights, markings, licenses, PII, records, and breach duties apply?		
Safety / environment	What site, OSHA, hazardous material, environmental, incident, and training requirements apply?		

Escalate uncertain clauses to qualified counsel or the appropriate compliance professional before representing compliance or submitting a price.

19. Official Government Sources

Use current official sources. Links can change; verify the page title and publication date before relying on a form or rule.

Source	Use	Official link
SAM.gov	Entity registration, opportunities, exclusions, contract data	https://sam.gov
SAM Entity Registration Checklist	Official document-collection guidance	https://sam.gov/sites/default/files/2024-11/entity-checklist.pdf
Acquisition.gov FAR	Current Federal Acquisition Regulation	https://www.acquisition.gov/regulation/far
Acquisition.gov DFARS	Defense Federal Acquisition Regulation Supplement	https://www.acquisition.gov/dfars
SBA Contracting Guide	Small-business federal contracting programs and assistance	https://www.sba.gov/federal-contracting
SBA Size Standards	Current size-standard tools and tables	https://www.sba.gov/document/support-table-size-standards
IRS Form W-9	Current official W-9 instructions and form	https://www.irs.gov/forms-pubs/about-form-w-9
NIST CUI	Controlled Unclassified Information cybersecurity guidance	https://csrc.nist.gov/projects/cui
PIEE	DoD procurement, invoicing, and related modules	https://piee.eb.mil
APEX Accelerators	No-cost/low-cost local government contracting assistance	https://www.apexaccelerators.us
USAspending	Federal award market research	https://www.usaspending.gov

20. Master Readiness Dashboard

Workstream	Status (R/A/G)	Owner	Next action	Due	Evidence link / folder
Registration / NAICS / certifications					
Capabilities / market research / pipeline					
Bid / no-bid / proposal compliance					
Pricing / vendor quotes					
Teaming / subcontracting					
Cybersecurity / legal / labor compliance					

30-day action plan

Week	Priority outcomes	Owner	Completion evidence
1	Validate registration, entity records, NAICS, and renewal calendar		
2	Finish capability statement, past-performance file, and search profile		
3	Build target-agency list, pipeline, bid scorecard, and teaming gaps		

Week	Priority outcomes	Owner	Completion evidence
4	Run a sample solicitation through compliance, pricing, proposal, and submission controls		

Executive Choices can help turn these readiness tools into an operating workflow for opportunity search, solicitation analysis, teaming, vendor sourcing, quotes, proposals, pipeline management, and post-award coordination.