

FUNDAMENTALS OF WORKING WITH THE FEDERAL GOVERNMENT

DIAGNOSTIC CHECKLIST

BASIC BUSINESS REQUIREMENTS		Y	N
1.	Are you a for-profit business registered in the State of Hawaii? If you are a Sole Proprietor, have you registered your trade name (commonly known as 'doing business as' or 'dba')?	<input type="checkbox"/>	<input type="checkbox"/>
2.	Have you considered the most strategic legal and ownership structure, articles of incorporation/organization, and by-laws for doing business with the federal government?	<input type="checkbox"/>	<input type="checkbox"/>
3.	Have you obtained a State of Hawaii general excise tax (GET) license?	<input type="checkbox"/>	<input type="checkbox"/>
4.	Have you obtained all applicable professional or special licenses applicable to your business?	<input type="checkbox"/>	<input type="checkbox"/>
5.	Have you obtained all applicable city and county and environmental permits for your business?	<input type="checkbox"/>	<input type="checkbox"/>
6.	Have you registered to pay applicable Federal and State taxes?	<input type="checkbox"/>	<input type="checkbox"/>
7.	Are you compliant with all Fair Employment Practices of the State and Federal Government?	<input type="checkbox"/>	<input type="checkbox"/>
8.	Are you properly insured – general liability, workers comp, auto, TDI, as appropriate?	<input type="checkbox"/>	<input type="checkbox"/>
9.	Do you have a business phone number?	<input type="checkbox"/>	<input type="checkbox"/>
10.	Do you have a business fax number?	<input type="checkbox"/>	<input type="checkbox"/>
11.	Do you have a business email address?	<input type="checkbox"/>	<input type="checkbox"/>
12.	Do you have business cards, pamphlets and other marketing materials?	<input type="checkbox"/>	<input type="checkbox"/>
13.	Do you have a business website?	<input type="checkbox"/>	<input type="checkbox"/>
14.	Do you have a business bank account?	<input type="checkbox"/>	<input type="checkbox"/>
15.	Do you accept payments by credit card?	<input type="checkbox"/>	<input type="checkbox"/>
MARKET RESEARCH			
16.	Have you determined that the Federal Government buys your goods and/or services?	<input type="checkbox"/>	<input type="checkbox"/>
17.	Have you spoken with contracting agencies, other contractors, trade organizations, technical assistance providers, etc. to research your market?	<input type="checkbox"/>	<input type="checkbox"/>
18.	Have you read newspaper articles, trade magazines, market reports, statistical data, etc. to research your market?	<input type="checkbox"/>	<input type="checkbox"/>
19.	Have you utilized the FPDS-NG (Federal Procurement Data System – Next Generation) to research your market?	<input type="checkbox"/>	<input type="checkbox"/>
20.	Have you utilized FedBizOpps (Federal Business Opportunities) to research your market?	<input type="checkbox"/>	<input type="checkbox"/>
21.	Have you utilized CCR (Central Contractor Registration) and the Dynamic Small Business Search to research your market?	<input type="checkbox"/>	<input type="checkbox"/>
BUSINESS STRATEGY			
22.	Do you have a business plan?	<input type="checkbox"/>	<input type="checkbox"/>
23.	Do you have adequate working capital funds (i.e. cash, line of credit)?	<input type="checkbox"/>	<input type="checkbox"/>
24.	Have you fully utilized the technical assistance providers available to you?	<input type="checkbox"/>	<input type="checkbox"/>
FEDERAL GOVERNMENT REGISTRATION			
25.	Do you know your company's relevant NAICS (North American Industry Classification System) Codes?	<input type="checkbox"/>	<input type="checkbox"/>
26.	Do you know your company's relevant SIC (Standard Industrial Classification) Codes?	<input type="checkbox"/>	<input type="checkbox"/>
27.	Do you know your company's relevant FSCs/PSCs (Federal Supply Codes/Product Service Codes)?	<input type="checkbox"/>	<input type="checkbox"/>
		Y	N
28.	Are you registered with Dun and Bradstreet (for US Government Contractors and Grantees)? Do you know your DUNS Number?	<input type="checkbox"/>	<input type="checkbox"/>
29.	Are you registered with CCR (Central Contractor Registration)? Do you know your CAGE Code?	<input type="checkbox"/>	<input type="checkbox"/>

- 30. Are you registered with the SBA Supplemental Page (AKA Dynamic Small Business Search)?
- 31. Have you compiled a list of references and included it on your SBA Supplemental Page?
- 32. Are you registered with ORCA (Online Representations and Certifications)?
- 33. Are you registered with FedBizOpps (Federal Business Opportunities)?
- 34. Are you registered with WAWF (Wide Area Work Flow)?
- 35. Are you registered with the Department of Defense EDA (Electronic Document Access)?
- 36. Are you registered with the PTAC (Procurement Technical Assistance Center) Bid Match service?

FEDERAL PROCUREMENT BASICS

- 37. Are you familiar with the procurement process?
- 38. Are you familiar with procurement regulations?
- 39. Are you familiar with contracting methods?
- 40. Are you familiar with dollar thresholds?
- 41. Are you familiar with the Government Contracting and SBA (Small Business Administration) personnel?
- 42. Are you familiar with Small Business programs?
- 43. Are you familiar with responding to solicitations?
- 44. Are you familiar with submitting bid/proposal/quotation packages?
- 45. Are you familiar with award procedures?
- 46. Are you familiar with debriefing procedures?
- 47. Are you familiar with protest/termination/resolution procedures?
- 48. Are you familiar with payment procedures?
- 49. Are you familiar with past performance reporting?
- 50. Are you familiar with subcontracting procedures?

SMALL BUSINESS PROGRAM ELIGIBILITY

- B1. **(+1)** Are you a small business as defined by SBA (Small Business Administration) Size Standards?
- B2. **(+1)** Are you eligible to self-certify as a VOSB (Veteran Owned Small Business) – a small business, at least 51% owned by ≥ 1 veteran (as defined in 38 U.S.C. §101(2)), AND management and daily business operations controlled by ≥ 1 veteran?
- B3. **(+2)** Are you eligible to self-certify as a WOSB (Woman Owned Small Business) – a small business, at least 51% owned by ≥ 1 women, AND management and daily business operations controlled by ≥ 1 woman?
- B4. **(+2)** Are you eligible to self-certify as an SDB (Small Disadvantaged Business) – a small business, at least 51% owned and controlled by ≥ 1 socially (i.e. ethnic minority) and economically (i.e. < \$750,000) disadvantaged individuals who are of good character and citizens of the United States?
- B5. **(+3)** Are you eligible to self-certify as a SDVOSB (Service Disabled Veteran Owned Small Business) – a small business, at least 51% owned by ≥ 1 service-disabled veteran, AND management and daily business operations controlled by ≥ 1 service-disabled veteran OR in the case of veteran with permanent and severe disability, the spouse or permanent caregiver of such a veteran, AND with 0%-100% service-connected disability as defined in 38 U.S.C. §101(16) and documented on DD 214 or equivalent?

	Y	N
B6. (+3) Are you eligible to be certified by the SBA as a HUBZone (Historically Underutilized Business Zone) Program participant – a small business, at least 51% owned by U.S. citizens, AND having its principal office located in a designated HUBZone, AND having ≥ 35% of its employees residing in designated HUBZones?	<input type="checkbox"/>	<input type="checkbox"/>
B7. (+3) Are you eligible to be certified by the SBA as an 8(a) Business Development Program participant – a small business, at least 51% owned and controlled by ≥ 1 socially (i.e. ethnic minority) and economically (i.e. < \$250,000) disadvantaged individuals who are of good character and citizens of the United States?	<input type="checkbox"/>	<input type="checkbox"/>
CONSTRUCTION CONTRACTORS ONLY		
C1. (-3) Do you have a (QCM) Quality Control Management Plan in place?	<input type="checkbox"/>	<input type="checkbox"/>
C2. (-3) Do you have a Safety Plan in place?	<input type="checkbox"/>	<input type="checkbox"/>
C3. (-3) Are you familiar with Davis-Bacon rates and payment requirements for your employees?	<input type="checkbox"/>	<input type="checkbox"/>
C4. (-3) Are you familiar with certified payroll?	<input type="checkbox"/>	<input type="checkbox"/>
C5. (-3) Do you have adequate bonding capacity?	<input type="checkbox"/>	<input type="checkbox"/>
SERVICE CONTRACTORS ONLY		
D1. (-3) Do you have a QCM (Quality Control Management) Plan in place?	<input type="checkbox"/>	<input type="checkbox"/>
D2. (-3) Do you have a Safety Plan in place?	<input type="checkbox"/>	<input type="checkbox"/>
D3. (-3) Are you familiar with Service Contract rates and payment requirements for your employees?	<input type="checkbox"/>	<input type="checkbox"/>

SCORE WORKSHEET

CATEGORY	POINTS AWARDED	TOTALS
CHECKLIST, 1-50	+2 FOR EVERY 'YES'	
SMALL BIZ BONUS, B1-B7	+1 TO +3 FOR EVERY 'YES'	
CONSTRUCTION ONLY, C1-C5	-3 FOR EVERY 'NO'	
SERVICE KTR ONLY, D1-D3	-3 FOR EVERY 'NO'	
GRAND TOTAL		

SCORE ASSESSMENT

POINTS SCORED	ASSESSMENT
0 – 39 PTS	NEED MORE WORK
40 – 59 PTS	NOT QUITE READY
60 – 79 PTS	OK, BUT KEEP IMPROVING
80 – 89 PTS	READY FOR SUCCESS
90 – 100+ PTS	ALREADY MAKING MONEY