

Award-to-Sub Ready sample package

A six-page example of the files used to prepare first-tier subcontractors after award: a requirements register, source and open-item log, subcontractor information sheet, limitation-on-subcontracting tracker, and final delivery summary.

PUBLIC CONTRACT SNAPSHOT	VERIFIED PUBLIC DATA
Prime contractor	Dunbar Mechanical Contractors, LLC
Award ID / date	36C24926C0055 VA July 8, 2026
Value / classification	\$4,678,807 SDVOSB set-aside NAICS 238210
Public scope	Energy-management upgrade: BACnet, fiber backbone, controls, low-voltage electrical, fire-alarm integration, commissioning, and general construction support.
Source set	SAM.gov award notice; public solicitation DOCX; 517-page public specification PDF; Acquisition.gov clause text.

HOW THE PACKAGE IS ORGANIZED

01 Source Every requirement points back to the contract, specification, or clause.	02 Status Ready, open, and blocked items are separated.	03 Next step The file shows who reviews next, what input is missing, and what decision is needed.
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What we do with the public documents

The regulations and contract documents are public. We identify the requirements that apply, cite the source, separate missing inputs from pending decisions, and organize the editable files the project team will use.

This illustrative sample uses public contract records only. No client data was used, and the sample does not describe any contractor's internal process, purchasing plans, or current needs.

Contract requirements and action register

The table connects each applicable requirement to the action, record, deadline, and source the project team needs. Final subcontract language follows the contractor's normal contract or legal review.

Trigger	Working action	Record produced	Timing / source
U.S. construction subcontract	Map labor-standard clauses and prepare the SF 1413 acknowledgment workflow.	Executed subcontract, SF 1413 tracker, clause-version check.	At award; SF 1413 within 14 days. FAR 52.222-11
Non-COTS subcontract over \$45,000	Request written exclusion disclosure and check SAM exclusions.	Signed disclosure, dated public check, reviewer log.	Before subcontract award. FAR 52.209-6
Construction subcontract over \$3,500	Map E-Verify requirement and capture the subcontractor response.	Acknowledgment and process evidence status.	At subcontract award. FAR 52.222-54(e)
Every subcontract / supplier agreement	Map prompt-payment, interest, withholding, and lower-tier requirements.	Contract review notes and open-item record.	At award and during payment administration. FAR 52.232-27(c)
Covered construction labor	Map paid-sick-leave requirements to the work package.	Requirement acknowledgment and evidence request.	At subcontract award. FAR 52.222-62(m)
All subcontracts and agents	Map trafficking-in-persons requirements and escalation records.	Prepared requirement, workforce notice status, incident log field.	At award and during performance. FAR 52.222-50(i)

Why the tracker is updated during performance

The limitation-on-subcontracting calculation uses amounts paid by the Government, documented material costs, and payments to non-similarly-situated firms. The award value alone cannot show the current position, so the amounts and status must be updated during performance.

Source and open-item log

Public records and contractor-supplied information remain separate. When project files arrive, each missing input or unresolved decision is assigned a status, responsible person, and due date.

Control	Evidence expected	Sample status	Decision / next action
Source set	Award notice, solicitation, specification, amendments	COMPLETE - PUBLIC	Request the executed prime contract and amendments before final mapping.
Award facts	ID, date, value, set-aside, NAICS, scope	VERIFIED - PUBLIC	Public data confirms the sample facts, not the contractor's current need.
Proposed-sub roster	Legal name, trade, tier, value, location, material cost	OPEN - CLIENT INPUT	Needed to apply clause triggers and value controls.
Exclusions	Written 52.209-6 disclosure plus dated public check	OPEN - PER SUB	A public check does not replace the subcontractor's written disclosure.
Business status	Certification, NAICS size, tier, scope evidence	OPEN - PER SUB	Match status to the award program and subcontract NAICS.
Labor flowdowns	Awarded clause versions and signed SF 1413	OPEN - PER SUB	Track due dates from each subcontract award.
Payment terms	Prompt pay, interest, withholding, lower-tier flowdown	READY FOR REVIEW	The contract review notes go to the contractor's specialist for final language.
Safety / access	CP, training, APP/AHA inputs, badge status	OPEN - PER SUB	Request project-specific worker and subcontractor records.
Value control	Paid amounts, materials, non-similarly-situated values	OPEN - LIVE DATA	Update throughout performance; the award ceiling is not the denominator.
Controls qualification	Projects, personnel, facility, response capability	EXCEPTION - SPEC	Resolve conflicting specification thresholds; see page 5.

Delivery file structure

Folder	Contents
00_contract-source	Contract, amendments, scope references, source log
01_requirement-index	Trigger register, source links, review decisions
02_sub-01 ... sub-03	Identity, scope, value, disclosures, evidence, acknowledgments
03_value-control	Live calculation, status evidence, open issues
99_open-items	Open questions, owner, due date, specialist-review flags

One information sheet for each proposed subcontractor

The contractor or proposed subcontractor provides the project facts. We organize the response, add available public verification, and record every missing item for follow-up.

Block	Requested field	Response / evidence status
IDENTITY	Legal name / DBA; UEI / CAGE; address; business contact	_____
SCOPE	Trade / work package / tier; proposed value; location	\$ _____ tier: ____ location: _____
MATERIALS	Estimated materials excluded from the value-control base	\$ _____ support: _____
STATUS	Subcontract NAICS / size; SDVOSB or VOSB evidence	NAICS: _____ SMALL: Y / N / REVIEW evidence: _____
SIMILARLY SITUATED	Qualification for this award and lower-tier work	YES / NO / REVIEW basis: _____
EXCLUSIONS	Written FAR 52.209-6 disclosure; dated SAM check	RECEIVED / OPEN / N/A checked: _____
FLOWDOWNS	Labor / SF 1413; E-Verify; trafficking; sick leave	READY / OPEN / REVIEW due: _____
PAYMENT	Prompt pay; interest; withholding; lower-tier terms	READY / OPEN / REVIEW
SAFETY	Competent Person; training; APP / AHA inputs	RECEIVED / OPEN / N/A gaps: _____
ACCESS	Workers requiring VA access or badges	_____
PROJECT	Controls-sub qualification package	RECEIVED / OPEN / N/A / REVIEW

A Facts Marked by the person or organization that supplied them.	B Public verification Recorded with the source and date checked.	C Items to resolve Moved to the open-item log with an owner and due date.
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Subcontracting-limit tracker and specification conflict

A. Limitation-on-subcontracting control

Selected category: SPECIAL TRADE CONSTRUCTION. The working file tracks the applicable Government-paid amount, documented materials, and payments to firms that are not qualifying similarly situated entities.

Line	Live control	Value
A	Amount paid by Government for contract performance	\$ _____
B	Documented cost of excluded materials	\$ _____
C	Adjusted performance base (A - B)	\$ _____
D	Maximum non-similarly-situated payments (C x 75%)	\$ _____
E	Actual / forecast non-similarly-situated payments	\$ _____
F	Headroom (D - E)	\$ _____ GREEN / AMBER / RED

The \$4,678,807 award value is not entered on line A: public data does not establish actual Government payments, material costs, subcontract values, or entity status.

B. Controls-subcontractor specification conflict

Specification	Public requirement	Action required
23 09 23, PDF 191-192	Single source; 5 similar projects; facility within 50 miles; 3 years' experience.	OPEN - confirm whether this section controls.
23 09 23 - 1.1, PDF 257-258	5 facility-wide upgrades in 7 years; facility within 100 miles; two-hour response; 5 years' experience.	OPEN - confirm precedence and amendments.

The conflict stays open until the executed contract, amendments, and project decision are reviewed. The intake requirement is updated only after that decision is recorded.

Package contents

The proposal confirms the scope, schedule, price, responsible parties, and communication method before work begins. This page shows the files included in this sample and the inputs needed to complete them for a live project.

Files in this sample package	Inputs needed from the contractor
+ Awarded-contract source index and requirements register + Subcontractor information and evidence files + Public entity checks and written-disclosure tracker + Labor, payment, safety, access, and value-control trackers + Open-item log and editable final working files	+ Executed prime contract and amendments + Proposed-sub names, work packages, tiers, and values + Material-cost and work-location facts + Existing subcontract template, if requirements are being mapped + One project contact for decisions and evidence requests

Prepared inputs for final review

- + Contract and legal specialists receive source-linked questions, contract review notes, and the supporting documents needed for final language and approval.
- + Insurance, payroll, safety, and compliance specialists receive organized evidence and a list of the items still requiring formal review.
- + The project team receives editable files, current status, owners, due dates, and a short walkthrough of the package.

Editable after delivery

01 Editable files Delivered in an editable format for ongoing updates.	02 Open-item log Open items stay in the log instead of being buried in notes.	03 Responsible person Each next action has an owner and due date.
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Public sources used for this sample

SAM.gov award: <https://sam.gov/opp/c14ed35a46e34aeb9c19d18af402dcce/view>

SAM.gov solicitation: <https://sam.gov/opp/3d0d063ea0e64709a7c79f860d5514b7/view>

Acquisition.gov: FAR 52.209-6, 52.222-11, 52.222-50, 52.222-54, 52.222-62, and 52.232-27. Specification references: PDF 59-62, 70-78, 191-192, and 257-258.