

PREQUALIFICATION CHECKLIST

Use this checklist to prepare your business for procurement and capital readiness. Completing these items will help demonstrate your business is capable, credible, and ready to scale.

*Note: If you do not yet have all the items listed below, the resources available on the **Nebraska Small Business Resource Hub** can help you access the tools, services, and guidance needed to complete them.*

COMPANY AND MARKETING DOCUMENTS

- ☐ CAPABILITY STATEMENT
- ☐ GENERAL COMPANY INFORMATION (LEGAL NAME, EIN, ADDRESS, CONTACTS, ETC.)
- ☐ CERTIFICATIONS (8(a), WOSB, DBE, MBE, HUBZone, SDVOSB, ETC.)
- ☐ SPECIAL LICENSES OR SECURITY CLEARANCES (IF APPLICABLE)
- ☐ BUSINESS STRUCTURE DOCUMENTATION:
 - ☐ ARTICLES OF ORGANIZATION (FOR LLCs)
 - ☐ ARTICLES OF INCORPORATION (FOR S-CORPs AND C-CORPs)
 - ☐ OPERATING AGREEMENT OR BYLAWS (IF APPLICABLE)
- ☐ PROOF OF OWNERSHIP FOR DIVERSITY CERTIFICATION (IF APPLICABLE)
- ☐ COMPANY WEBSITE (CLEAR, PROFESSIONAL, MOBILE-RESPONSIVE)

FINANCIAL & BANKING INFORMATION

- ☐ TWO MOST RECENT YEARS OF BUSINESS TAX RETURNS
 - ☐ IRS FORM 1065 (FOR LLCs FILING AS PARTNERSHIPS)
 - ☐ IRS FORM 1120S (FOR S-CORPs)
 - ☐ IRS FORM 1120 (FOR C-CORPs)
- ☐ MOST RECENT BALANCE SHEET AND INCOME STATEMENT
- ☐ STATEMENT OF CASH FLOW (RECOMMENDED)
- ☐ BANKING INFORMATION (PRIMARY INSTITUTION, CREDIT LINES IF APPLICABLE)
- ☐ LETTER OF GOOD STANDING FROM BANK (OPTIONAL BUT HELPFUL)
- ☐ INTERNAL FINANCIAL CONTROLS POLICY (IF AVAILABLE)
- ☐ INVOICING SYSTEM OR SOFTWARE (E.G. QUICKBOOKS, WAVE)

BONDING & INSURANCE

- ☐ BONDING CONTACT AND LETTER OF BONDABILITY
- ☐ PROOF OF BUSINESS INSURANCE:
 - ☐ GENERAL LIABILITY
 - ☐ WORKERS COMPENSATION
 - ☐ PROFESSIONAL LIABILITY (IF REQUIRED)



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PREQUALIFICATION CHECKLIST (CONTINUED)

REFERENCES

- ☐☐☐ THREE TRADE REFERENCES (VENDORS / SUPPLIERS)
- ☐☐☐ THREE PROJECT REFERENCES (INCLUDE CONTRACT VALUE, SCOPE, AND COMPLETION DATE)

TECHNICAL CAPABILITY & PERFORMANCE

- ☐ PAST PERFORMANCE SUMMARY SHEET (3-5 COMPLETED PROJECTS)
- ☐ PROJECT CAPACITY OVERVIEW (TYPES, VALUES, AND VOLUME OF WORK YOU CAN HANDLE)
- ☐ SAM.GOV REGISTRATION (WITH UEI)
- ☐ DSBS PROFILE (UPDATED AND OPTIMIZED)
- ☐ ABILITY TO SUBMIT DIGITAL PROPOSALS (PDF, ONLINE UPLOADS)

SAFETY & COMPLIANCE (FOR CONSTRUCTION / INDUSTRIAL CONTRACTORS)

- ☐ OSHA RECORDABLE INCIDENT RATE
- ☐ EXPERIENCE MODIFICATION RATE (EMR)
- ☐ LOST WORKDAY INCIDENT RATE
- ☐ 3-YEAR OSHA SAFETY HISTORY

OPERATIONAL DOCUMENTS

- ☐ QUALITY ASSURANCE & CONTROL PROCESSES
- ☐ ORGANIZATIONAL CHART (OPTIONAL)
- ☐ EQUIPMENT / ASSETS LIST (IF APPLICABLE)
- ☐ RESUMES OF KEY TEAM MEMBERS (FOR TECHNICAL OR MANAGEMENT-HEAVY BIDS)
- ☐ HR / EMPLOYEE HANDBOOK (IF APPLICABLE)
- ☐ CONFLICT OF INTEREST OR ETHICS POLICY (RECOMMENDED FOR PUBLIC / CORPORATE WORK)
- ☐ GROWTH STRATEGY OR SCALING PLAN
- ☐ SUCCESSION PLAN (OPTIONAL, ESPECIALLY FOR MATURE OR FAMILY-OWNED BUSINESSES)



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