**CBO Checklist**

Documents required:

* Properly completed HSP form
* Email log
* Copy of the email showing the solicitation going out
* Copy of solicitation

HSP Form Checklist:

* + Section 1 complete:
    - Included company name?
    - Included State of Texas VID if company is a HUB?
    - Included a point of contact who can answer questions about the information included in the rest of the form?
    - Included the direct email address for the point of contact?
    - Included the direct phone number for the point of contact?
    - Marked whether your company is a HUB?
    - Included the project number and name?
    - Included the bid open (due) date?
  + Section 2 complete:
    - Section 2a: Checked “Yes”
    - Section 2b: Included only one scope of work?
      * Listed the name of the scope (not the name of the company recommended – i.e. Plumbing, Mechanical, etc)?
      * Included the percentage of the contract (GMP) anticipated to be awarded to HUBs from this scope?
      * Included the percentage of the contract (GMP) anticipated to be awarded to Non-HUBs from this scope?
    - Section 2c: Checked “No”
    - Section 2d: Checked “No”
  + Section 4 complete:
    - Signed form?
    - Printed name?
    - Printed Title?
    - Dated the form?
  + Method B Section B-1 complete:
    - Item Number and Description match information from Section 2b?
  + Method B Section B-2 complete:
    - Marked either “Yes” or “No”?
  + Method B Section B-3 complete:
    - Section B-3a complete:
      * Notices were sent to at least three HUBs (ideally more than three)?
      * All HUBs were given at least 7 working days to respond (not including the day notices were sent, the day bids were due, federal or state holidays, or weekends)?
    - Section B-3b complete:
      * Three HUBs are listed?
      * Included the correct Texas VID for each HUB (check CMBL)?
      * All HUBs listed had an active certification at the time notice was sent (check CMBL)?
      * Included the correct Date Notice Sent for each HUB (reference email log)?
      * Marked if the HUB responded?
    - Section B-3c complete:
      * Notices were sent to at least two (2) trade organizations or development centers (ideally more than two)?
      * All trade organizations or development centers were given at least 7 working days to respond (not including the day notices were sent, the day bids were due, federal or state holidays, or weekends)?
    - Section B-3d complete:
      * Two trade organizations or development centers are listed?
      * Included the correct Date Notice Sent (check email log)?
      * Marked if the entity responded?
  + Method B Section B-4 complete:
    - Section B-4a complete:
      * Item Number and Description match Section B-1?
    - Section B-4b complete:
      * Recommended subcontractor company name listed?
      * Marked whether company is a HUB?
      * Included Texas VID for if company is a HUB?
      * Included the approximate (estimated) dollar amount?
      * Included the expected percentage of contract?
      * Included all sub-tier subcontractors and their company information?
    - Section B-4c complete:
      * Included written justification if company recommended is not a HUB?

Email Log Checklist:

* + Has date stamps?
  + Includes all HUBs listed on HSP form?
  + All HUBs were given at least 7 working days to respond (not including the day notices were sent, the day bids were due, federal or state holidays, or weekends)?
  + Includes all trade organizations or development centers listed on HSP form?
  + All trade organizations or development centers were given at least 7 working days to respond (not including the day notices were sent, the day bids were due, federal or state holidays, or weekends)?

Solicitation Checklist:

* + Includes a point of contact?
  + Includes the scope of work?
  + Includes where or how to view the plans and specifications?
  + Includes where or how to view bonding and insurance requirements?