**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?