



# Office for Historically Underutilized Businesses

## HUB Construction Reporting

# Welcome to HUBSCO System Training!

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HUB Office  
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<http://ncadmin.nc.gov/businesses/hub>

# Housekeeping

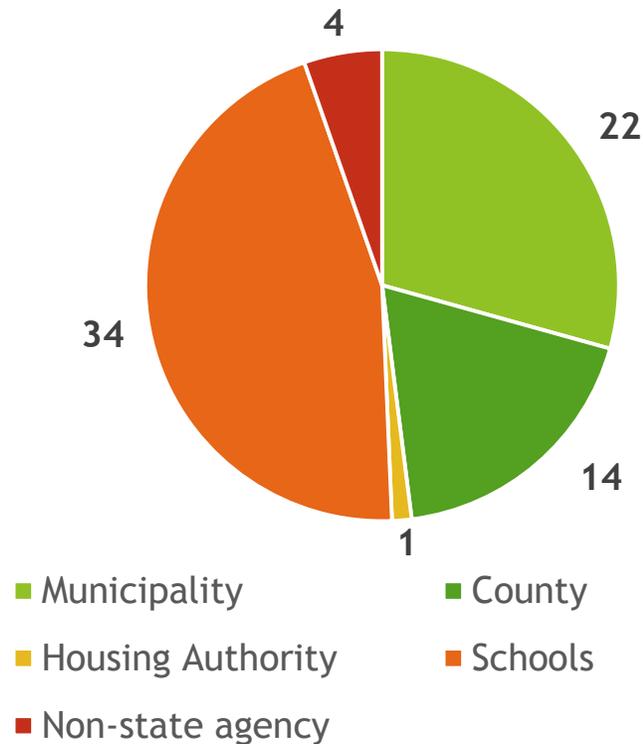
- ▶ We have almost 80 people registered for this training.
- ▶ A lot to cover
- ▶ PLEASE MUTE YOUR PHONES
- ▶ Ways to ask questions:
  - ▶ Wait until we call for questions and unmute.
  - ▶ Use the WebEx chat feature to type your question.
- ▶ The session will be recorded and it is our intent to post that recording on our website.

# Who is participating in the webinar?

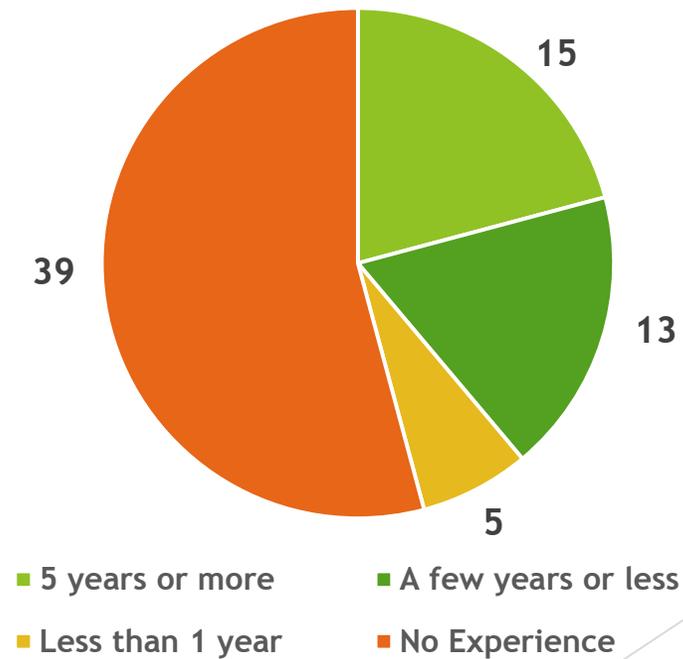
## ▶ Who registered for the webinar....

- ▶ 27.5% have had some HUBSCO training in the past
- ▶ 50% have never entered a project in HUBSCO, 20% have entered 6 or more projects

Registrations by Entity Type



Experience with HUBSCO



# What kind of questions did people ask?

- ▶ How are utility projects that fall in the formal range to be reported?
- ▶ Is there any way to have a drop down menu of the HUB vendors so that when they are selected their address, phone, etc. will populate the required fields automatically?
- ▶ What information should be entered in the Final Design-Related Services or Miscellaneous Cost fields?
- ▶ What information needs to be entered while reporting data?
- ▶ What happens if I have incomplete information from the vendors?
- ▶ What are the correct steps for entering a project?
- ▶ Do all bidders that turned in bids need to be added to HUBSCO for the particular project or just the bidder that was awarded the bid?

# The HUB Office

- ▶ Established by Executive Order 150 in 1999
- ▶ **Our Vision:** The HUB Office is an organization that advocates actions which increase opportunities for historically underutilized businesses and promotes diversity and inclusion in state government procurement and contracting.
- ▶ **Our Mission:** To promote economic opportunities for historically underutilized businesses in state government contracting and procurement that will foster their growth and profitability
- ▶ We certify HUB vendors, provide technical assistance to HUB vendors, work to identify and eliminate barriers that restrict HUB vendors from doing business with State and local agencies, and collect and analyze data on construction projects as well as purchases of goods and services.

# Legislative Background

## ▶ Senate Bill 914

- ▶ Enacted and signed December 2001
- ▶ Requires state and local Public Entities to report data and minority participation on construction projects to NC Department of Administration (DOA)
- ▶ Requirements for promoting use of minority contractors
- ▶ Requires documentation and reporting of good faith efforts
- ▶ Promotes and facilitates HUB participation, no mandated quotas or set asides, does not override competitive bidding (lowest responsive, responsible bidder)

# What projects have to be reported

- ▶ Projects that are \$30,000 or more need to be in HUBSCO (total cost)
  - ▶ Informal Projects: \$30,000 - \$499,999.99
  - ▶ Formal Projects: \$500,000 and above
- ▶ Building construction or repair projects
  - ▶ “Building” is not specifically defined in statute, but one definition from Webster’s Eleventh defines it as “a roofed and walled structure built for permanent use.”
  - ▶ Exception: “purchase and erection of prefabricated or relocatable buildings or portions thereof, except that portion of work which must be performed at the construction site” - GS 143-128.2 (j)
- ▶ Street and Utility projects are not required to be reported.
  - ▶ NC Department of Environment and Natural Resources (DENR) interprets the statute to apply to utilities (applicable if grant funds from DENR are received).

# Verifiable Percent Goal - GS 143-128.2 (a)

- ▶ GS 143-128.2 (a) Minority business participation goals
  - ▶ A local government unit or other public or private entity that receives State appropriations for a building project or other State grant funds for a building project, including a building project done by a private entity on a facility to be leased or purchased by the local government unit, where the cost of the project is \$100,000 or more, shall have a verifiable 10% goal for participation by minority businesses in the total value of the work..
  - ▶ ... a local government unit may apply a different verifiable goal that was adopted prior to December 1, 2001, if the local government unit had and continues to have a sufficiently strong basis in evidence to justify the use of that goal.

# Good Faith Efforts GS 143-128.2 (b)

- ▶ A public entity shall establish prior to solicitation of bids the good faith efforts that it will take to make it feasible for minority businesses to submit successful bids or proposals for the contracts for building projects.
- ▶ Public entities shall make good faith efforts
- ▶ Public entities shall require contractors to make good faith efforts
- ▶ Each first-tier subcontractor on a construction management at risk project shall comply with the requirements applicable to contractors under this subsection.
- ▶ Good Faith Efforts forms can be found in the Good Faith Effort Appendices & Forms section as the bottom of the following page:  
<http://www.doa.nc.gov/hub/legislation.aspx>

# Questions

- ▶ Questions?

# Who counts as HUB certified

- ▶ Contractors or subcontractors who are currently HUB certified.
- ▶ The HUB Office is the only state entity that can grant HUB certification.
- ▶ There is a certification process administered by the HUB Office
  - ▶ Certification is valid for four years, provided that the business continues to meet the eligibility requirements.
  - ▶ How long does it take to get certified? 45 - 90 days from when the HUB Office has received all necessary documentation.

# What is a HUB vendor?

## HUB certification requirements (G.S. 143-128.4)

- ▶ At least 51% of business is owned by one or more persons who are members of at least one of the groups in 143-128.4 (b)
- ▶ For corporations, 51% of stock must be owned by one or more persons who are members of at least one of the groups in 413-128.4 (b)
- ▶ The management and daily business operations must be controlled by at least one of the groups in 143-128.4 (b)
- ▶ Business must be owned and controlled as in 143-128.4 (b) by one or more citizens or lawful permanent residents of the United States who are members of one or more of the following groups:
  - ▶ Black
  - ▶ Hispanic
  - ▶ Asian American
  - ▶ American Indian
  - ▶ Female
  - ▶ Disabled
  - ▶ Disadvantaged

# How do you find HUB Vendors

- ▶ Statewide Uniform Certification, Search for Vendor Information:  
<https://www.ips.state.nc.us/vendor/searchvendor.aspx?t=h>
- ▶ All 3,200+ firms in this search are HUB certified firms.
- ▶ Can search by company name, City, County, Commodities, Construction specialties
- ▶ What if a minority vendor is not listed in the search?
  - ▶ Encourage them to become certified
  - ▶ Have them contact the HUB Office or send their information to us so we can contact them.



State of North Carolina  
Office for Historically Underutilized Businesses  
Search for Vendor Information

This page allows you to search for vendors by one or more selection criteria. To search for a vendor, enter your search criteria in the form below and click the SEARCH button. If any criteria do not apply simply leave that item blank.

**City of Durham** - To search for businesses to meet participation goals, click [http://www.durhamnc.gov/applications/SDBE\\_public/Index.cfm](http://www.durhamnc.gov/applications/SDBE_public/Index.cfm) or call (919) 560-4180.

**City of Charlotte** - To search for businesses certified as Small Business Enterprise firms with the City of Charlotte, click <http://chameck.org/city/charlotte/CharlotteBusinessInclusion/VendorServices/Pages/default.aspx#vendor> or call (704) 336-2473.

Vendor Number:

Company Name:  (type in just the first 3 or 4 letters to expand your results)

Contact Last Name:  (type in just the first 3 or 4 letters to expand your results)

Email Address:  (type in just the first 3 or 4 letters to expand your results)

HUB Certification: Yes

Small Business: Not Specified

City:

County:  Hold down the control(Ctrl) key and click to select multiple counties.

- All---
- ALAMANCE
- ALEXANDER
- ALLEGHANY

# HUB Vendor Search Example: New Hanover County

As of October 22, 2015 there are 57 entries for HUB Vendors in New Hanover County.

14 of those HUB Vendors have a construction license.

Click on the Company Name to get more information.

Page 1 of 4

Total of 57 records found

1 2 3 4							
<u>Company Name</u>	<u>Address</u>	<u>City, State</u>	<u>County</u>	<u>Zip</u>	<u>Contact Info</u>	<u>HUB</u>	<u>Small Bus.</u>
<a href="#">A&amp;A Facility Services, Inc.</a>	505 Cornelius Harnett Dr.	Wilmington, NC	NEW HANOVER	28401	Contact: Jordan, Linda Phone: (910)763-5447 x Fax: (910)763-5644 TollFree: (800)529-6254 Email: <a href="mailto:ljordan@aafacilityservices.com">ljordan@aafacilityservices.com</a>	B	Yes
<a href="#">A1 Security Services LLC</a>	5101 Dunlea Court Suite # 210	Wilmington, NC	NEW HANOVER	28403	Contact: Babb, Theresa Phone: (910)540-3091 x  Email: <a href="mailto:guardservice1a@yahoo.com">guardservice1a@yahoo.com</a>	W	Yes
<a href="#">A1 Security Services LLC</a>	4608 Cedar Ave.Suite 111	Wilmington, NC	NEW HANOVER	28403	Contact: Babb, Theresa Phone: (910)540-3091 x Fax: (910)399-7040  Email: <a href="mailto:guardservice1a@yahoo.com">guardservice1a@yahoo.com</a>	W	Yes
<a href="#">Access Communication Solutions, Inc</a>	509 Cornelius Harnett Drive Suite A	Wilmington, NC	NEW HANOVER	28401	Contact: Brewington, Tim Phone: (910)343-6981 x Fax: (910)362-9697  Email: <a href="mailto:accessCsolutions@aol.com">accessCsolutions@aol.com</a>	B	Yes
<a href="#">ALL STATE SUPPLY CO., INC.</a>	4844 HWY 421 N	WILMINGTON, NC	NEW HANOVER	28401	Contact: MERRITT, CYNTHIA Phone: 910-343-8282 x Fax: 910-343-1081	W	Yes

# HUB Vendor Search

- ▶ Company information includes:
  - ▶ Contact information
  - ▶ Small Business
  - ▶ HUB category
  - ▶ Services / License Numbers
  - ▶ Registered Construction Codes
  - ▶ Registered Commodities

[Return to Result List](#)

## Wrightsville Beach Plumbing

Detail Information		
Contact:	Kathy Roberts	Added on: 12/23/2009 2:16:57 PM
Address:	PO Box 960 Wrightsville Beach, NC 28480 NEW HANOVER	
Phone:	(910)256-2873	
Fax:	(910)392-1711	
Toll Free:		
Email Address:	wbplumbing@bellsouth.net	

Small Business:	No
HUB Verified:	Yes W
Business Type:	Corporation
Services/License Numbers:	Plumbing/Fire Sprinkler Systems Contractor NC Lic # 9429
Limitation:	
License/Work Classifications:	NONE, P-I

Registered Construction Codes
15400 Plumbing Fixtures and Equipment

Registered Commodities
670 Plumbing Equipment, Fixtures, and Supplies

# Questions

- ▶ Questions?

# Reporting on Construction Spending

- ▶ State Agencies, Universities and Community Colleges use InterScope+ to report
- ▶ Municipalities, Counties, School Systems, Airport Authorities, Hospital Associations, Water and Sewer Authorities and Non-State Agencies use HUBSCO to report
- ▶ Reporting Due Dates:
  - ▶ October 10, 2015
  - ▶ January 10, 2016
  - ▶ April 10, 2016
  - ▶ July 10, 2016

# HUB Construction by the numbers, FY 14-15

- ▶ **Municipalities (11 reported, 5 used HUBs)**
  - ▶ \$83,975,448 Total Construction
  - ▶ \$9,296,178 HUB
  - ▶ 11.07% HUB Participation
- ▶ **School Systems (16 reported, 12 used HUBs)**
  - ▶ \$182,796,324 Total Construction,
  - ▶ \$47,476,872 HUB
  - ▶ 25.97% HUB Participation
- ▶ **Counties (14 reported, 6 used HUBs)**
  - ▶ \$56,785,555 Total Construction,
  - ▶ \$4,492,135 HUB
  - ▶ 7.91% HUB Participation

# HUBSCO - getting started

- ▶ In order to use HUBSCO, public entities (schools, counties, municipalities etc.) request access.
- ▶ Submit Access Form to help set up public entity account
- ▶ Two levels of access, Public Entity User and Public Entity System Administrator.
- ▶ User can enter information about projects.
- ▶ System Administrator can enter information about projects and add/modify users.

**HUBSCO CONSTRUCTION REPORTING SYSTEM  
ACCESS FORM**

PHONE: (919) 807-2330 // FAX: (919) 807-2335 // E-MAIL: huboffice.doa@ncmail.net  
Form must be faxed to Mathew Idiculla (including all required signatures listed below)

**PUBLIC ENTITY INFORMATION**

Public Entity Name: \_\_\_\_\_  
 Type of Public Entity: -----Select----- \_\_\_\_\_  
 Address 1: \_\_\_\_\_  
 Address 2: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Courier/MSC \_\_\_\_\_  
 County: \_\_\_\_\_  
 Main Phone No.: ( ) \_\_\_\_\_ Ext.: \_\_\_\_\_

**CONTACT INFORMATION**

Primary Contact Name: \_\_\_\_\_  
 Phone No.: ( ) \_\_\_\_\_ Ext.: \_\_\_\_\_  
 E-Mail: \_\_\_\_\_  
 Responsible \_\_\_\_\_  
 Official Contact Name: \_\_\_\_\_  
 Official Contact Phone No.: ( ) \_\_\_\_\_ Ext.: \_\_\_\_\_  
 Official Contact E-Mail: \_\_\_\_\_

**MINORITY BUSINESS OUTREACH PLAN AND VERIFIABLE PERCENT GOAL INFORMATION**

A Minority Business Outreach Plan Has Been Developed and Implemented:  Yes  No

Date Plan Was Implemented: (If Applicable) \_\_\_\_/\_\_\_\_/\_\_\_\_

Public Entity Verifiable Percent Goal: \_\_\_\_\_% (Set to zero (0) if the Public Entity utilizes Verifiable Percentage Goals by Ownership Categories)

Ownership Category	Public Entity Goal
Black:	_____ %
Hispanic:	_____ %
Asian-American:	_____ %
American Indian:	_____ %
White Female:	_____ %
Socially and Economically Disadvantaged:	_____ %

\*\*\*\*\*

**< FOR ALL NON-STATE PUBLIC ENTITIES >**

(1) VERIFIABLE PERCENT GOAL CERTIFICATION/VERIFICATION METHOD: \_\_\_\_\_  
(i.e. - SB 914, Internal Disparity Study, etc.)

(2) DATE VERIFIABLE PERCENT GOAL ESTABLISHED: \_\_\_\_/\_\_\_\_/\_\_\_\_  
VERIFIABLE PERCENT ADOPTION MEANS: \_\_\_\_\_  
(i.e. - Board Minutes, Internal Policy, etc.)

\*\*\*\*\*

I hereby authorize the individuals listed below to submit their Public Entity information in an effort to comply with construction reporting requirements as mandated by SB914.

# What information you will need

- ▶ HUBSCO requires a lot of information to be entered.
- ▶ How to know what will be asked:
  - ▶ Go to <http://www.doa.state.nc.us/hub/Reporting.aspx>
  - ▶ Select HUBSCO Informal Report Form for projects that are \$30,000 to \$499,999.99
  - ▶ Select HUBSCO Formal Report Form for projects that are \$500,000 or more.



# Questions for the people who have used HUBSCO

- ▶ What documents have you used to get the information needed for HUBSCO?
- ▶ Who do you get it from?
  - ▶ Internally?
  - ▶ Contractors?
- ▶ How long does it take to get that information?

# Inbox - what you see upon Log in

Take Me To:    **HUBSCO Reporting System** [Logout](#)

**Inbox for Guenther, John**  
[Show Inbox for HUBSCO Training Entity](#)

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**Informal Projects**

Project #	Project Name	Created Date	Action
			<a href="#">Add</a>
676-852	Test pave	6/29/2015	<a href="#">Edit</a> - <a href="#">Delete</a>
PO 791059	Grounds Storage Shed #3	6/12/2015	<a href="#">Edit</a> - <a href="#">Delete</a>
PO 791060	Grounds Storage Shed #4	7/7/2015	<a href="#">Edit</a> - <a href="#">Delete</a>
PO 791061	Grounds Storage Shed #5	7/9/2015	<a href="#">Edit</a> - <a href="#">Delete</a>
Tip test	Whilte Lake test	7/30/2015	<a href="#">Edit</a> - <a href="#">Delete</a>

**Formal Projects**

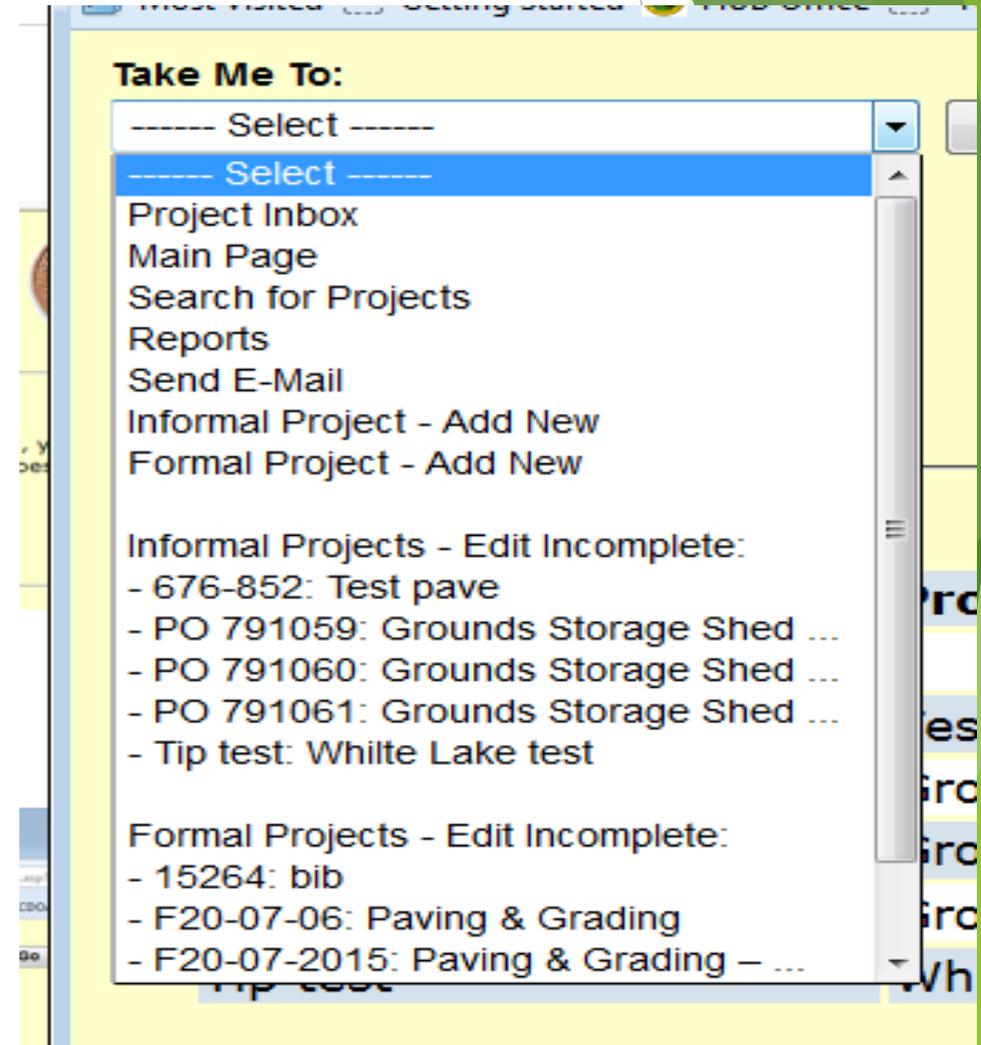
Project #	Project Name	Created Date	Action
			<a href="#">Add</a>
15264	bib	7/2/2015	<a href="#">Edit</a> - <a href="#">Delete</a>
F20-07-06	Paving & Grading	6/12/2015	<a href="#">Edit</a> - <a href="#">Delete</a>
F20-07-2015	Paving & Grading – Barr-Mill Park, Greensboro, NC	7/8/2015	<a href="#">Edit</a> - <a href="#">Delete</a>

# Navigating in HUBSCO

“Take Me To” Drop down menu:

- Project Inbox
- Main Page
- Search for Projects
- Reports

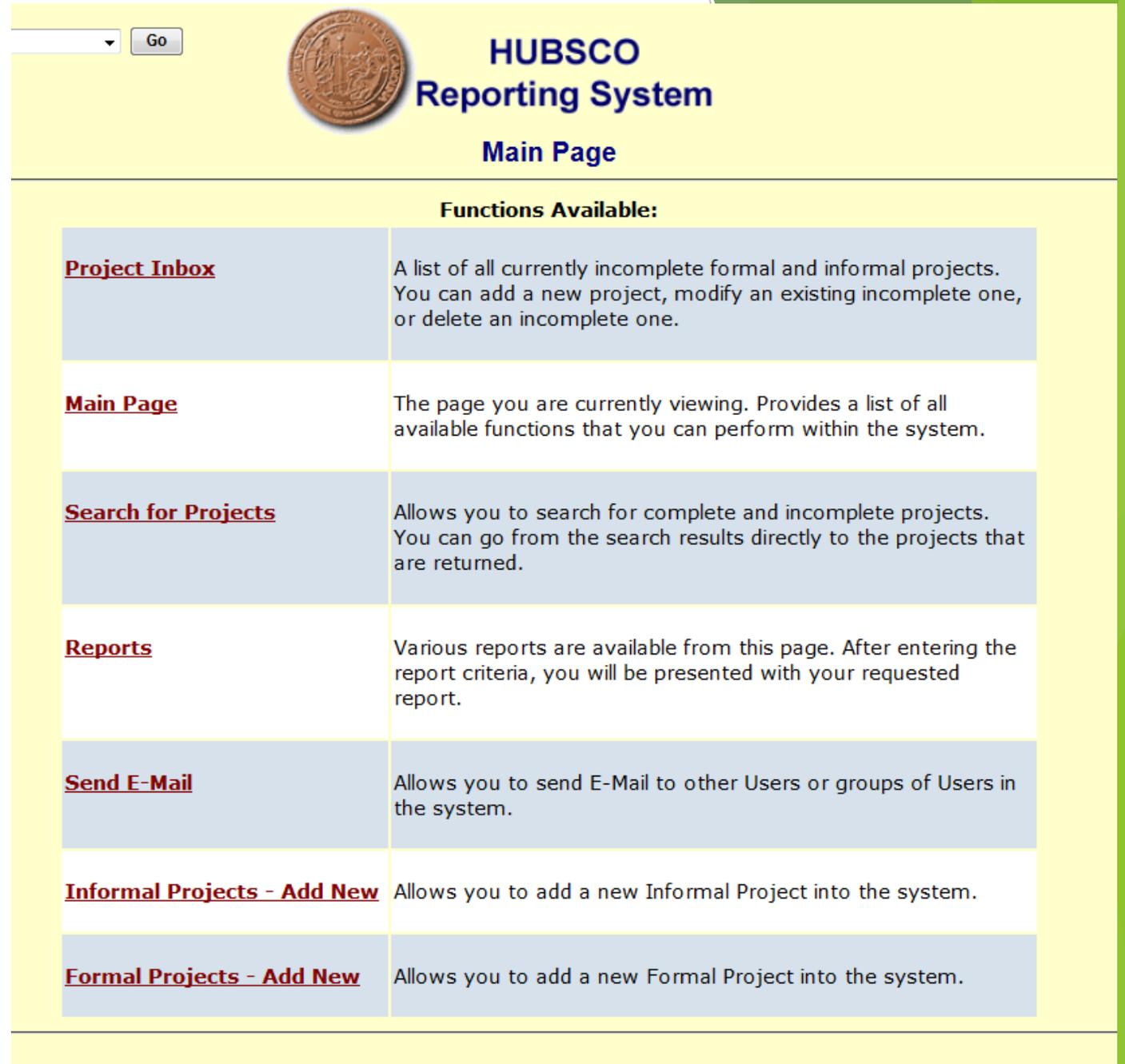
Remember to click on GO after making your selection.



# Main Page

Links to different HUBSCO functions:

- Project Inbox
- Main Page
- Search for Projects
- Reports
- Send E-mail
- Informal Projects - Add New
- Formal Projects - Add New



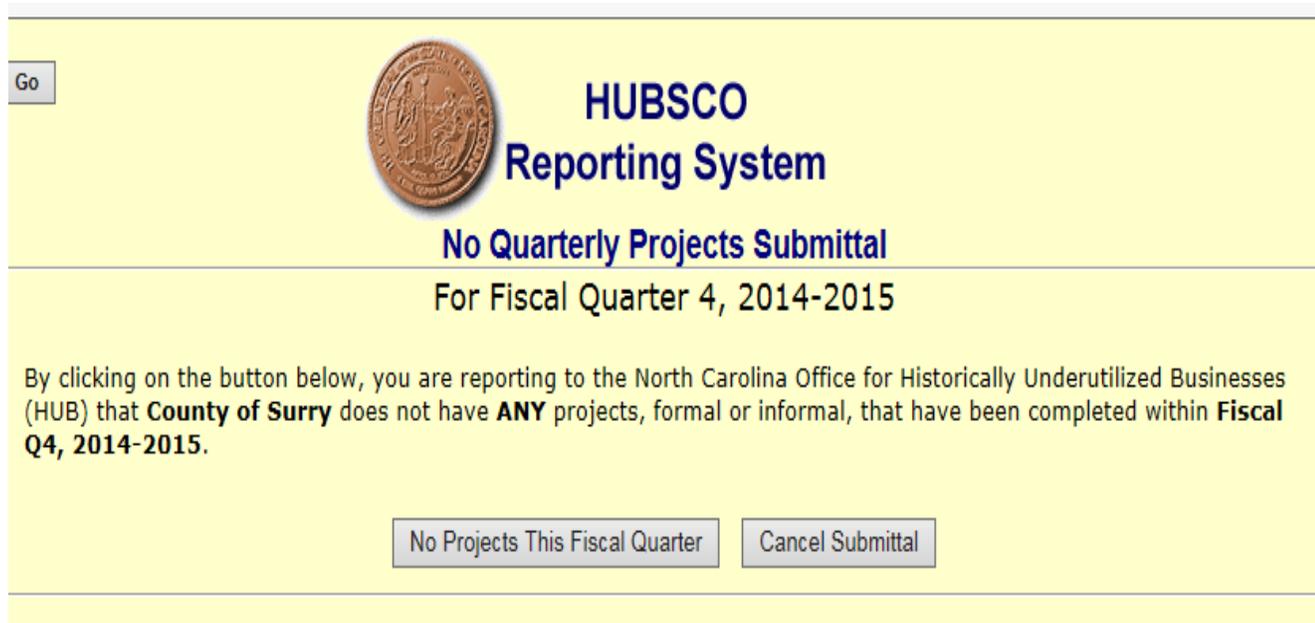
 **HUBSCO Reporting System**  
**Main Page**

**Functions Available:**

<a href="#"><u>Project Inbox</u></a>	A list of all currently incomplete formal and informal projects. You can add a new project, modify an existing incomplete one, or delete an incomplete one.
<a href="#"><u>Main Page</u></a>	The page you are currently viewing. Provides a list of all available functions that you can perform within the system.
<a href="#"><u>Search for Projects</u></a>	Allows you to search for complete and incomplete projects. You can go from the search results directly to the projects that are returned.
<a href="#"><u>Reports</u></a>	Various reports are available from this page. After entering the report criteria, you will be presented with your requested report.
<a href="#"><u>Send E-Mail</u></a>	Allows you to send E-Mail to other Users or groups of Users in the system.
<a href="#"><u>Informal Projects - Add New</u></a>	Allows you to add a new Informal Project into the system.
<a href="#"><u>Formal Projects - Add New</u></a>	Allows you to add a new Formal Project into the system.

# No projects to report?

- ▶ When a Public Entity does not have any completed projects within a particular quarter, the Entity needs to submit a “No Quarterly Projects Submittal” form in the system.
  - ▶ 1. In the Take Me To: drop-down box, select No Quarterly Projects Submittal and click on the Go button
  - ▶ 2. In the No Quarterly Projects Submittal page click the No Projects This Fiscal Quarter button at the bottom of the page



The screenshot shows a web form with a yellow background. At the top left is a 'Go' button. In the center is the HUBSCO Reporting System logo, which includes a circular seal of the State of North Carolina and the text 'HUBSCO Reporting System'. Below the logo is the title 'No Quarterly Projects Submittal' and the subtitle 'For Fiscal Quarter 4, 2014-2015'. A paragraph of text explains that clicking the button reports to the North Carolina Office for Historically Underutilized Businesses (HUB) that the County of Surry does not have any projects completed within Fiscal Q4, 2014-2015. At the bottom are two buttons: 'No Projects This Fiscal Quarter' and 'Cancel Submittal'.

Go

 **HUBSCO**  
**Reporting System**

**No Quarterly Projects Submittal**  
For Fiscal Quarter 4, 2014-2015

By clicking on the button below, you are reporting to the North Carolina Office for Historically Underutilized Businesses (HUB) that **County of Surry** does not have **ANY** projects, formal or informal, that have been completed within **Fiscal Q4, 2014-2015**.

No Projects This Fiscal Quarter    Cancel Submittal

# HUBSCO flow when adding projects

- ▶ Inbox - Add Formal or Informal
- ▶ Project Main data entry screen
- ▶ Primary Designer screen
- ▶ Construction Contract screen
- ▶ Construction Contractor Contacted Directly screen
- ▶ Construction Contractor screen (Contractor and Subcontractor)
- ▶ Project View
- ▶ Finalize Project

# How to Add a Project

- ▶ Click Add in either Informal or Formal Projects.
- ▶ Be sure you click Add in the correct type of Project, you can't go back later and change it.

## Inbox for Guenther, John

[Show Inbox for HUBSCO Training Entity](#)

### Informal Projects

Project #	Project Name	Created Date	Action
			<a href="#">Add</a>
676-852	Test pave	6/29/2015	<a href="#">Edit</a> - <a href="#">Delete</a>
PO 791059	Grounds Storage Shed #3	6/12/2015	<a href="#">Edit</a> - <a href="#">Delete</a>

### Formal Projects

Project #	Project Name	Created Date	Action
			<a href="#">Add</a>
15264	bib	7/2/2015	<a href="#">Edit</a> - <a href="#">Delete</a>
F20-07-06	Paving & Grading	6/12/2015	<a href="#">Edit</a> - <a href="#">Delete</a>

# Project Main data entry screen

- ▶ Required fields:
  - ▶ Project Number
  - ▶ Project Name
  - ▶ Type of Project
  - ▶ Location of Project
  - ▶ Total Square Footage
  - ▶ Original Project Value
  - ▶ Project Includes State Appropriation or State Grant Funds
  - ▶ Verifiable Percent Goal: default is 10%, can be changed.

**\* Indicates a Required Field**

<b>*Project Number:</b>	<input type="text"/>
<b>*Project Name:</b>	<input type="text"/>
Notice to Proceed / Project Start Date:	<input type="text"/>
Project Completion Date: (Acceptance Date)	<input type="text"/>
Construction Method Used:	-----Select----- ▾
<b>*Type of Project:</b>	-----Select----- ▾
<b>*Location of Project:</b>	-----Select----- ▾
<b>*Total Square Footage:</b>	<input type="text"/> ft. <sup>2</sup>
<b>*Original Project Value:</b> (Combination of all Design-Related Services and Construction Contracts)	\$ <input type="text"/>
<b>Final Design-Related Services Value:</b> (Including any Change Orders) <b>*Do not enter when Construction Method Used is 'Design-Build'</b>	\$ <input type="text"/>
<b>Final Construction Value:</b> (Including any Change Orders)	\$ <input type="text"/>
<b>Miscellaneous Costs:</b>	\$ <input type="text"/>
<b>Final Project Value:</b> (Including any Change Orders)	\$ <input type="text"/>
<b>*Project Includes State Appropriation or State Grant Funds:</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<b>*Verifiable Percent Goal:</b> (Change to Local Goal if other than 10%)	<input type="text" value="10"/> % (Entering a Verifiable Agencies on projects include State Appropriation)

# Project Main View

## Project “tabs”

- Project Main
- Designers
- Contracts
- Project View
- Finalize Project

**Add/Edit Informal Project**  
**Project Tip test: White Lake test**  
**Project Main View**

Project Main [Designers](#) [Contracts](#) [Project View](#) [Finalize Project](#)

**Main Project Data**

Project Number:	Tip test
Project Name:	White Lake test
Project Created By:	John Guenther
Project Created On:	07/30/2015
Notice to Proceed / Project Start Date:	
Project Completion Date: (Acceptance Date)	
Duration of Project: (From Notice to Proceed Date to Completion Date)	
Construction Method Used:	
Type of Project:	Informal Projects
Location of Project:	Bladen County
Total Square Footage:	15000 ft. <sup>2</sup>
Original Project Value:	\$293,592
Final Design-Related Services Value: (Including all Change Orders)	\$0
Final Construction Value: (Including all Change Orders)	\$0
Miscellaneous Costs:	\$0
Final Project Value: (Including all Change Orders)	\$0
Project Includes State Appropriation or State Grant Funds:	Yes
Verifiable Percentage Goal:	10%

[Edit Project Main Data](#)

# Primary Designer Screen

- ▶ Required fields:
  - ▶ Prime Designer Name
  - ▶ Type of Service
  - ▶ Discipline
  - ▶ Ownership Category
  - ▶ Ownership is Minority Female
  - ▶ Source of Ownership Category Certification/Verification (State of NC HUB is really the only option if HUB certified)
  - ▶ Original Contract Value
  - ▶ Method of Solicitation

**\* Indicates a Required Field**

<b>*Prime Designer Name:</b>	<input type="text"/>
<b>*Type of Service:</b>	-----Select-----
<b>*Discipline:</b>	-----Select-----
<b>*Ownership Category:</b>	-----Select-----
<b>*Ownership is Minority Female:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>*Source of Ownership Category Certification/Verification:</b>	-----Select-----
<b>*Original Contract Value:</b>	\$ <input type="text"/>
<b>Final Contract Value:</b> (Including any Change Orders)	\$ <input type="text"/>
<b>*Method of Solicitation:</b>	-----Select-----

**Open-Ended Contract / Convenience Contract Informa**

<b>Number:</b>	<input type="text"/>
<b>Start Date:</b>	<input type="text"/>
<b>End Date:</b>	<input type="text"/>



# Add a New Construction Contract

Most time in HUBSCO will probably be in this section

- Add a New Construction Contract
- Contractors Contacted Directly
- Contractors Used

**Add/Edit Informal Project**  
**Project Tip test: White Lake test**  
**Construction Contracts**

[Project Main](#) [Designers](#) [Contracts](#) [Project View](#) [Finalize Project](#)

---

[Add a New Construction Contract](#)

Contract Description / ID	Contract Method of Advertisement	Contract Dates	Action
White Lake Test	Both Published and Electronic	Contract: 11/11/2014 Proceed: 12/13/2014 Complete: 5/15/2015	<a href="#">Edit Contract</a> <a href="#">Go to Contractors Contacted Directly</a> <a href="#">Go to Contractors Used</a> <a href="#">Delete Contract</a>

# Construction Contract screen

- ▶ Required fields:
  - ▶ Contract Description / ID
  - ▶ Contract Method of Advertisement
  - ▶ Contract Date

Construction Contract	
<a href="#">Project Main</a>	<a href="#">Designers</a>
<a href="#">Contracts</a>	<a href="#">Project View</a>
<b>* Indicates a Required Field</b>	
<b>*Contract Description / ID:</b>	<input type="text"/>
<b>*Contract Method of Advertisement:</b>	<input type="text" value="-----Select-----"/>
<b>*Contract Date:</b>	<input type="text"/>
<b>Notice to Proceed / Contract Start Date:</b>	<input type="text"/>
<b>Contract Completion Date:</b> (Acceptance Date)	<input type="text"/>

# Construction Contractor Contacted Directly screen

- ▶ Required fields:
  - ▶ Firm Name
  - ▶ Address
  - ▶ City
  - ▶ State
  - ▶ Zip Code
  - ▶ Ownership Category
  - ▶ Ownership is Minority Female
  - ▶ Source of Ownership Category Certification/Verification
  - ▶ Primary Type of Work
  - ▶ Date Contacted
  - ▶ Method of Contact
  - ▶ Response Due Date
  - ▶ Specifications Provided
  - ▶ Was a Quote Received

**Construction Contractor Contacted Directly**  
[Project Main](#) [Designers](#) [Contracts](#) [Project View](#) [Finalize Project](#)

\* Indicates a Required Field

Contract Description / ID: Serenity fields

\*Firm Name:

\*Address:

\*City:

\*State:

\*Zip Code:

Telephone #:

Extension:

\*Ownership Category: -----Select-----

\*Ownership is Minority Female:  Yes  No

\*Source of Ownership Category Certification/Verification: -----Select-----

\*Primary Type of Work: -----Select-----

\*Date Contacted:

\*Method of Contact: -----Select-----

\*Response Due Date:

\*Specifications Provided: -----Select-----

\*Was a Quote Received:  Yes  No

Amount of Quote Received: \$

# Construction Contractor screen

- ▶ For Contractors and Subcontractors
- ▶ Required fields:
  - ▶ Firm Name
  - ▶ City
  - ▶ State
  - ▶ Ownership Category
  - ▶ Ownership is Minority Female
  - ▶ Source of Ownership Category Certification/Verification
  - ▶ Original Contract Value

**Construction Contractor**

[Project Main](#) [Designers](#) [Contracts](#) [Project View](#) [Finalize Project](#)

**\* Indicates a Required Field**

**Contract Description / ID:** Serenity fields

**\*Firm Name:**

**\*City:**

**County:** -----Select-----  
(If State is North Carolina)

**\*State:**

**Reason for Out-of-State Selection:** Not Applicable  
(If applicable)

**Primary Type of Work Performed:** -----Select-----

**\*Ownership Category:** -----Select-----

**\*Ownership is Minority Female:**  Yes  No

**\*Source of Ownership Category Certification/Verification:** -----Select-----

**\*Original Contract Value:** \$

**Final Contract Value:** \$   
(Including any Change Orders)



# Project Finalization Check

- ▶ Any errors detected will be displayed with:
  - ▶ Page where error was found
  - ▶ Field where the error was found
  - ▶ What the error was
- ▶ Errors must be corrected before being able to finalize the project (this may include filling out non-required fields)

## Project Finalization Check

[Project Main](#) [Designers](#) [Contracts](#) [Project View](#) Finalize Project

The following error(s) must be corrected before the Project can be finalized:

Click on the link to the page to correct the error(s)

Error Page	Field	Value	Error
<a href="#">Main Project Page</a>	Notice to Proceed / Project Start Date		This field is required for Project Finalization
	Project Completion Date		This field is required for Project Finalization
	Construction Method Used		This field is required for Project Finalization
	Final Construction Value	\$275,000	This field must equal the total entered Construction contract values (\$0)
<a href="#">Construction Contractors for Contract: Serenity fields</a>	N/A	N/A	The Primary Construction Contractor must be entered for each Construction Contract

# Minority Business Participation

- ▶ Project Finalization Review screen you will see Minority Business Participation and Contract Values to see if you are meeting Verifiable Goal.

**Minority Business Participation and Contract Values**

	Total Contracts	Minority Business Participation							Total MBE
		B	H	AA	AI	WF	SE	D	
Design-Related	\$50,000	\$0 0.0%	\$50,000 100.0%	\$0 0.0%	\$0 0.0%	\$0 0.0%	\$0 0.0%	\$0 0.0%	\$50,000 100.0%
Construction	\$195,000	\$0 0.0%	\$0 0.0%	\$0 0.0%	\$0 0.0%	\$0 0.0%	\$0 0.0%	\$0 0.0%	\$0 0.0%
Project Totals	\$245,000	\$0 0.0%	\$50,000 20.4%	\$0 0.0%	\$0 0.0%	\$0 0.0%	\$0 0.0%	\$0 0.0%	\$50,000 20.4%

Key: B=Black H=Hispanic AA=Asian-American AI=American Indian WF=White Female SE=Socially and Economically Disadvantaged D=Disabled

# Search options

Take Me To:   [Lo](#)



## HUBSCO Reporting System

### Agency Search Options

This page allows you to locate projects in process by one or more selection criteria. To search for projects in process, enter your search criteria in the form below and click the SEARCH button. If any criteria do not apply simply leave that item blank.

Project Created By:    
Public Entity: HUBSCO Training Entity

Project Number:

Project Name:

Project Form:    
Status:

To search by date, you must enter a begin and end date.

Project Start Date: **From:**  **To:**

Key Words:

Type up to 5 words that may appear in the project. A match on any word, and that fits the other criteria, will result in that document being listed. List each keyword separated by a comma. To search for apples and oranges type **Apples, Oranges**.

# Search Results

## Agency Search Results

[Search Again](#)

What did I search for? Entity=HUBSCO Training Entity  
Project Form=Informal/Formal  
Status=Incomplete

Page 1 of 1

Total of 8 Records Found

<u>Project Number</u>	<u>Project Name</u>	<u>Informal/Formal</u>	<u>Project Created</u>	<u>Project Started</u>	<u>Project Ended</u>	<u>Project Created by</u>
<a href="#">15264</a>	bib	Formal	7/2/2015			Guenther, John
<a href="#">676-852</a>	Test pave	Informal	6/29/2015	5/6/2015	6/29/2015	Guenther, John
<a href="#">F20-07-06</a>	Paving & Grading	Formal	6/12/2015	3/8/2014	11/30/2014	Guenther, John
<a href="#">F20-07-2015</a>	Paving & Grading – Barr-Mill Park, Greensboro, NC	Formal	7/8/2015	3/8/2015	6/30/2015	Guenther, John
<a href="#">PO 791059</a>	Grounds Storage Shed #3	Informal	6/12/2015	4/12/2015	5/29/2015	Guenther, John
<a href="#">PO 791060</a>	Grounds Storage Shed #4	Informal	7/7/2015	4/15/2015	5/29/2015	Guenther, John
<a href="#">PO 791061</a>	Grounds Storage Shed #5	Informal	7/9/2015	4/12/2015	5/29/2015	Guenther, John
<a href="#">Tip test</a>	Whilte Lake test	Informal	7/30/2015			Guenther, John

# Updating User Information

- ▶ With over 200 entities reporting in HUBSCO we rely on System Administrators to keep user information up to date.
- ▶ We send out quarterly reminders to enter completed projects, without updated information those notifications may not be received
- ▶ We received approximately 250 returned e-mails in June because email addresses were not updated or staffing had changed
- ▶ System Administrators can add and delete Users
  - ▶ The HUB Office has capabilities to update information. However, System Administrators are required to update users, unless there has been an administrative change.
- ▶ **SO PLEASE KEEP YOUR INFORMATION UP TO DATE**

## List of Users for Office for Historically Underutilized Businesses

User Name	Action...
	<a href="#">Add...</a>
Daniels, Carla	<a href="#">Edit...</a> <a href="#">Delete...</a>
English, Dennis	<a href="#">Edit...</a> <a href="#">Delete...</a>
Fleming, Traci	<a href="#">Edit...</a> <a href="#">Delete...</a>
Guenther, John	<a href="#">Edit...</a> <a href="#">Delete...</a>
Hicks, Bradley	<a href="#">Edit...</a> <a href="#">Delete...</a>
Oruma, Val	<a href="#">Edit...</a> <a href="#">Delete...</a>
Oruma, Valeria O.	<a href="#">Edit...</a> <a href="#">Delete...</a>
test, test	<a href="#">Edit...</a> <a href="#">Delete...</a>

# Reports

- ▶ There are a variety of reports that HUBSCO can generate:
  - ▶ Incomplete projects past project completion date
  - ▶ Projects more than 10 days past completion
  - ▶ Total Completed Design and Construction Contracts
  - ▶ Total Construction Dollars per Construction Method
  - ▶ Total Construction Dollars per type of work performed
  - ▶ Annual Reports
  - ▶ Quarterly Reports

# Ways the HUB Office can help

- ▶ Getting Access to HUBSCO
- ▶ Finding HUB certified vendors
- ▶ Encouraging non-certified minority/woman owned business to certify
- ▶ Outreach and Training
- ▶ Technical Support (plan, outreach, what to report, using reporting systems)

# Other Resources

- ▶ HUB Office Legislation and Executive Orders web page: <http://www.doa.nc.gov/hub/legislation.aspx>
- ▶ UNC School Of Government
  - ▶ Local Government Law Bulletin No. 131, February 2013: HUB Participation in Building Construction Contracting by NC Local Governments: Statutory Requirements and Constitutional Limitations
    - ▶ <http://www.sog.unc.edu/sites/www.sog.unc.edu/files/reports/lglb131.pdf>
- ▶ State Construction Office Manual: <http://www.nc-sco.com/scomanual.aspx>

# Questions

- ▶ Questions?

# Future Training Opportunities

- ▶ We hope to increase the frequency of our training webinars, possibly doing them quarterly.
- ▶ Topics covered may change over time.
- ▶ Trainings at conferences, including the NC Association of School Business Officials (NCASBO)
- ▶ Other opportunities???

# Rate your trainer

- ▶ We will be sending out an e-mail to everyone with a link to an assessment of this training.
- ▶ We want your honest feedback so that we can try to improve the trainings and meet your needs.

THANK YOU

The background features abstract, overlapping geometric shapes in various shades of green, ranging from light lime to dark forest green. These shapes are primarily located on the right side of the frame, creating a modern, layered effect against the white background.