



U.S. Small Business  
Administration

# Woman-Owned Small Business Certification

US Small Business Administration

Cleveland District Office

&

Ohio University PTAC at Cleveland



Procurement Technical  
Assistance Centers



OHIO  
UNIVERSITY

VOINOVICH SCHOOL OF LEADERSHIP AND PUBLIC AFFAIRS

Friday, June 19, 2020

# Set-Asides for Certification Programs and Socioeconomic Categories

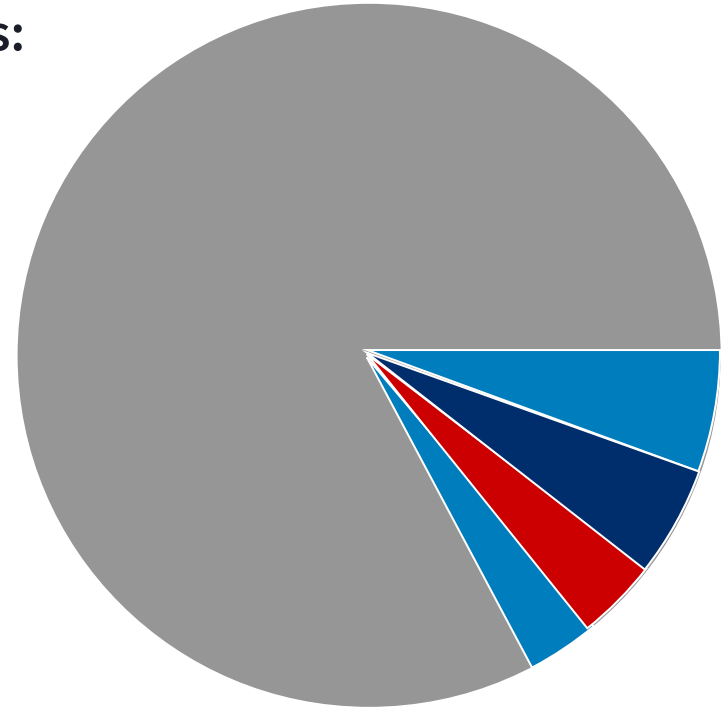
Targeted set-asides and acquisition goals:

**Women-Owned Small Businesses  
(5%)**

**Small Disadvantaged Businesses  
(including 8(a) certified) (5%)**

**HUBZone Businesses (3%)**

**Service-Disabled Veteran-Owned  
Small Businesses (3%)**



Set-asides are reserved for small businesses between \$10,000 (Micro-purchase Threshold) to \$250,000 (Simplified Acquisition Threshold).

**WOSB READY**



Procurement Technical  
Assistance Centers



OHIO  
UNIVERSITY

VOINOVICH SCHOOL OF LEADERSHIP AND PUBLIC AFFAIRS



# Women-Owned Small Business (WOSB) Federal Contract Program



**Take advantage of annual  
prime contracting goals**

**Build capacity and grow**

**Access set-asides for WOSB  
and EDWOSB**

**WOSB READY**



Procurement Technical  
Assistance Centers



VOINOVICH SCHOOL OF LEADERSHIP AND PUBLIC AFFAIRS



# Upcoming Certification Changes

- As of October 15, 2020, businesses competing for WOSB Federal Contracting Program set-aside contracts will have to be certified either through:
  - SBA's new, free online certification process; or
  - An approved Third-Party Certifier (TPC), at a cost.
- The current self-certification process will remain available for firms until October 15, 2020, in [certify.sba.gov](https://certify.sba.gov).
- Small businesses will still be able to utilize an approved TPC, at a cost, to obtain WOSB or EDWOSB certification.

**WOSB READY**



Procurement Technical  
Assistance Centers



OHIO  
UNIVERSITY

VOINOVICH SCHOOL OF LEADERSHIP AND PUBLIC AFFAIRS



# Certification Changes 2020 Timeline

<b>May</b>	New WOSB Federal Contracting Program regulations were published in the Federal Register. These regulations detail changes to the certification process.
<b>Now–July 15</b>	<p>Certified WOSBs must download their documentation, currently housed in the WOSB Program Repository, from <a href="https://certify.sba.gov">certify.sba.gov</a>.</p> <ul style="list-style-type: none"><li>• TPC certificates must still be uploaded into the WOSB Program Repository at <a href="https://certify.sba.gov">certify.sba.gov</a>.</li></ul>
<b>July 15</b>	<p>Firms can begin submitting applications under SBA’s new certification process for initial processing.*</p> <ul style="list-style-type: none"><li>• Firms that are TPC-certified must create a new account in the new certification platform and upload their TPC certificate for SBA to complete initial processing.</li></ul>
<b>October 15</b>	SBA will begin issuing decisions on certification.

*\* Further instructions for the new certification process will be detailed prior to July 15.*

**WOSB READY**



Procurement Technical  
Assistance Centers



UNIVERSITY

VOINOVICH SCHOOL OF LEADERSHIP AND PUBLIC AFFAIRS



# Third Party Ceritifiers

There are four organizations approved by the SBA to provide third-party certification. Contact them to find out about their certification process and any associated costs. They are:

[El Paso Hispanic Chamber of Commerce](#)

[National Women Business Owners Corporation](#)

[US Women's Chamber of Commerce](#)

[Women's Business Enterprise National Council](#)

Firms will need to provide proof of their third-party certification through [certify.sba.gov](https://certify.sba.gov). Read the instructions carefully to make sure you provide all the necessary information.

# Certification Changes Resources

- To stay up to date with changes to the WOSB Federal Contracting Program, please visit [sba.gov/wosbready](https://sba.gov/wosbready).
  - You also can contact your local [SBA regional and district office](#), SBA resource partner, or Procurement Technical Assistance Center (PTAC) with questions.
- Please review SBA's latest [FAQs](#) and [certification options table](#) for more information about the certification changes.

**WOSB READY**

# What is WOSB **READY** ?

- Partners on initiatives like ChallengeHER
- Hosts country-wide events
- Expands partnerships with stakeholders
- Shares updates on social media
- Conducts informational webinars

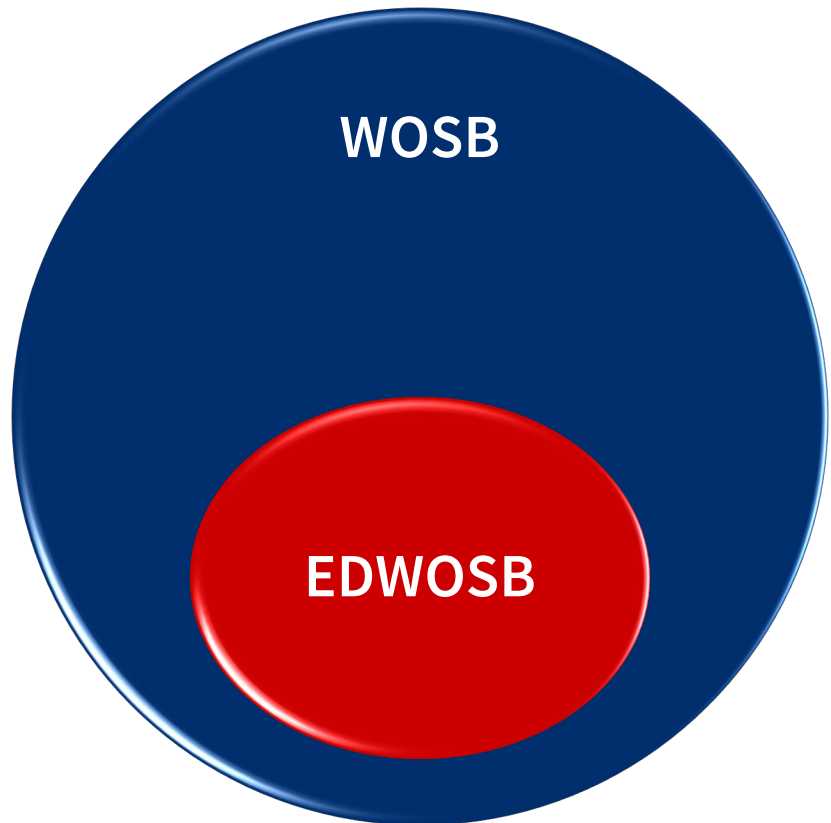




# WOSB and EDWOSB

- **WOSB:** Women-Owned Small Business
- **EDWOSB:** Economically Disadvantaged Women-Owned Small Business; WOSBs whose owner and/or manager claims economic disadvantage

EDWOSB is a subset of WOSB. As such, if you qualify as an EDWOSB, you automatically qualify as a WOSB.



**WOSB READY**

# Is the WOSB Certification Appropriate for You?



Managerial experience



Highest officer position



Proper NAICS codes



51% ownership requirements



Management of daily operations



No minimum time in business

**WOSB READY**



Procurement Technical Assistance Centers



OHIO UNIVERSITY

VOINOVICH SCHOOL OF LEADERSHIP AND PUBLIC AFFAIRS

# Economically Disadvantaged Requirements to Qualify



Personal net worth (assets minus liabilities) less than \$750,000

---



Three-year average income is \$350,000 or less

---



Fair market value of all assets is \$6 million or less

**WOSB READY**



Procurement Technical  
Assistance Centers



OHIO  
UNIVERSITY

VOINOVICH SCHOOL OF LEADERSHIP AND PUBLIC AFFAIRS




# WOSB Eligibility Process



- 
- Register in SAM
  - Submit application
  - Represent status in SAM
-

# Register in SAM.gov

[View assistance for SAM.gov](#)



[Forgot Username?](#)[Forgot Password?](#)

[Create an Account](#)

HOMESEARCH RECORDSDATA ACCESSGENERAL INFOHELP

### CREATE USER ACCOUNT

Your CCR username will not work in SAM. You will need a new SAM User Account to register or update your entity records. You will also need to create a SAM User Account if you are a government official and need to create Exclusions or search for FOUO information.

### REGISTER/UPDATE ENTITY

You can register your Entity (business, individual, or government agency) to do business with the Federal Government. If you are interested in registering or updating your Entity, you must first create a user account.

**New!** Use the SAM Status Tracker to:

### SEARCH RECORDS

All entity records from CCR/FedReg and ORCA and exclusion records from EPLS, active or expired, were moved to SAM. You can search these records and new ones created in SAM. If you are a government user logged in with your SAM user account, you will automatically have access to FOUO information.

WHAT IS SAM?

The **System for Award Management (SAM)** is the Official U.S. Government system that consolidated the capabilities of CCR/FedReg, ORCA, and EPLS. There is NO fee to register for this site. Entities may register at no cost directly from this page. User guides and webinars are available under the Help tab.

#### NEWS AND ANNOUNCEMENTS

**Update:** The [SAM.gov February 26, 2016 release notes](#) are posted. Remember, you can find release notes for all SAM.gov software releases at [SAM.gov > General Info > News > Release Notes](#).

**Password reset reminder:** Please note that SAM user account passwords need to be updated periodically to meet security standards. Instructions to reset your password can be found in the [SAM User Guide](#). Choose a unique and strong username and password. Do not share your password and always log off when you step away --- it only takes a moment for someone to steal or change the password.

#### USER GUIDES/HELPFUL HINTS

Find the full SAM User Guide, Quick Start Guides, Helpful Hints, and Webinars on the [HELP](#) tab.

Use the [SAM Status Tracker](#) to check your SAM entity registration status.

**Federal Service Desk**  
Search FAQs or request additional help at the [Federal Service Desk](#).

#### ATTENTION EXTRACT AND WEB SERVICE USERS

Support for the legacy-formatted extracts and web services in SAM ended on October 31st, 2014. Federal systems using SAM data must convert to the SAM-formatted extracts and web services. If you see "You do not have access to this extract" you need to submit a Data Access Request for the appropriate role by logging in with the account that needs the role. Go to "Data Access" then click on either "System Data Access Request" or "Individual Data Access Request" (depending on your user account type) and follow the prompts to submit the request. Visit the [openIAE GitHub site](#) for more information about SAM's data, web services, and [RESTful API](#).

# certify.SBA.gov



## SBA Certification Portal

- SBA's certification portal where businesses can submit documents to seek SBA certifications

## Automatic Migration

- Pulls business information from SAM.gov

## Online Forms

- Forms completed online (no longer required to upload certain SBA forms)

**WOSB READY**



Procurement Technical  
Assistance Centers



OHIO  
UNIVERSITY

VOINOVICH SCHOOL OF LEADERSHIP AND PUBLIC AFFAIRS



# WOSB Prime Contracting–FY18

Historic high: \$22B

Number of awardees: 16.8K WOSB prime contractors

## Industries:

- Professional, scientific, and technical services (NAICS sector 54)
- Construction (NAICS sector 23)

## •Top 5 agencies:

AGENCY	ACHIEVEMENT
<b>SBA</b>	28.52%
<b>Office of Personnel Management</b>	21.94%
<b>Department of Housing and Urban Development</b>	15.84%
<b>Nuclear Regulatory Commission</b>	13.84%
<b>Department of the Interior</b>	13.11%



Procurement Technical Assistance Centers



OHIO UNIVERSITY

VOINOVICH SCHOOL OF LEADERSHIP AND PUBLIC AFFAIRS

**WOSB READY**



# WOSB and EDWOSB Set-Aside Contracts

## Industry

### WOSB

NAICS code assigned to contract is in an industry where WOSBs are **substantially underrepresented**.

### EDWOSB

NAICS code assigned to contract is in an industry where WOSBs are **underrepresented**.

## Rule of Two

Contracting officer has reasonable expectation that 2 or more WOSBs will submit an offer.

## Award Price

Contract must be awarded at fair market price.



Procurement Technical Assistance Centers



OHIO UNIVERSITY

VOINOVICH SCHOOL OF LEADERSHIP AND PUBLIC AFFAIRS

WOSB **READY**





# WOSB and EDWOSB Sole-Source Contracts

**1**



## **Eligible NAICS Code**

WOSB/EDWOSB-eligible  
NAICS code

**2**



## **Fair and Reasonable Price**

Awarded at a fair and  
reasonable price

**3**



## **Contract Value**

\$6.5M for manufacturing  
or \$4M for all others

**4**



## **Sole-Source**

Only 1 WOSB/EDWOSB  
that can perform



Procurement Technical  
Assistance Centers



OHIO  
UNIVERSITY

VOINOVICH SCHOOL OF LEADERSHIP AND PUBLIC AFFAIRS

**WOSB READY**



# Proactive Self-Marketing



Identify federal **buyers** and get to know them.



Identify the agency contracting **procedures** and those who make buying decisions.



Focus on areas in your **niche** and prioritize.



Make **contacts** through small business events and network your business.

# Getting the Most Out of the WOSB Federal Contracting Program



Ability to qualify for set-aside or sole-source contract awards—increasing prime and subcontracting opportunities

---



Opportunity to build capacity and grow by establishing joint ventures and participating in the All Small Mentor-Protégé Program

---



Access to training, management, and technical assistance programs, as well as guaranteed loans and bonding assistance

# Cleveland Business to Business Matchmaker

*Major Buying Organizations looking for you!*

- Federal, State and local governmental agencies and large corporations
- Virtual Matchmaker event on Tuesday, July 28, 2020
- Details coming soon!

**SAM and PTAC registrants will get notified**

[clevelandbtobmatchmaker.com](http://clevelandbtobmatchmaker.com)

**WOSB READY**



Procurement Technical  
Assistance Centers



OHIO  
UNIVERSITY

VOINOVICH SCHOOL OF LEADERSHIP AND PUBLIC AFFAIRS



# Questions?

## Cleveland District SBA

***Vanessa Behrend***

216-522-4180, x 201

[vanessa.behrend@sba.gov](mailto:vanessa.behrend@sba.gov)

***Niah Duncan***

216-522-4826

[niah.duncan@sba.gov](mailto:niah.duncan@sba.gov)

## Ohio University PTAC at Cleveland

***Karen Wivell***

614-636-5024

[wivell@ohio.edu](mailto:wivell@ohio.edu)

This procurement technical assistance center is funded in part through a cooperative agreement with the Defense Logistics Agency.



Procurement Technical  
Assistance Centers



OHIO  
UNIVERSITY

VOINOVICH SCHOOL OF LEADERSHIP AND PUBLIC AFFAIRS

**WOSB READY**