

The New WOSB Certification and beta.certify.sba.gov

Presented by:





Introduction and Participant Guide

- NH PTAC –
- Stuff to know before we start
 - Muting
 - Chat function
 - Slides will be posted at www.NHEconomy.com/ptac under Training Presentations
 - Session is being recorded
 - We will post the recording as soon as we're able



A Quick Confession

- Usually (but not always) our presentations are drawn from long experience and diligent study
- Occasionally, we encounter a need to offer training on a new topic, like this one, where our experience is limited
- **We are eager to identify volunteers who will be our first clients to work through this application**



What Will Certification Do for Me?

- Certified WOSB/EDWOSB may be eligible for contract set-asides
 - Set-asides are limited to approved NAICS codes
 - Further limited by “rule of two”
 - May become more prevalent once certification is in place
- May help establish your WOSB status with Primes
 - Relieves them of potential liability if subcontractor misrepresents as a WOSB
 - Eliminates any need for them to do due diligence



When is Certification not a factor?

- ▶ Contracts in NAICS codes that are not listed for WOSB or EDWOSB
 - ▶ NOTE: All EDWOSB are also WOSB
- ▶ Contracts that are not set-aside
- ▶ Subcontracts with Prime contractors who are willing to accept your undocumented assertion of WOSB status



Women's Contracting Program

To be eligible, a business must:

- ▶ Be a [small business](#) in your primary NAICS
- ▶ Be at least 51 percent owned and controlled by women who are U.S. citizens
- ▶ Have women manage day-to-day operations and also make long-term decisions

- ▶ SBA also accepts a current, valid 8(a) certification. Firms must provide their 8(a) certification, annual review letters, or acceptance letter if in their first year through beta.certify.sba.gov.
- ▶ The eligibility requirements to qualify as a WOSB or an EDWOSB are fully defined in [Title 13 Part 127 Subpart B of the Code of Federal Regulations](#) (CFR). Firms can also get a preliminary assessment of whether they qualify at [SBA's beta.certify.sba.gov website](https://beta.certify.sba.gov).



EDWOSB Eligibility Requirements:

- ▶ To qualify as an economically disadvantaged business within the women's contracting program, a business must:
 - ▶ Meet all the requirements of the women's contracting program
 - ▶ Be owned and controlled by one or more women, each with a personal net worth less than \$750,000
 - ▶ Be owned and controlled by one or more women, each with \$350,000 or less in adjusted gross income averaged over the previous three years
 - ▶ Be owned and controlled by one or more women, each \$6 million or less in personal assets
- ▶ As of July 15, 2020, personal net worth standards for economically disadvantaged individuals have been aligned between the 8(a) Business Development Program and the WOSB Federal Contracting Program. EDWOSBs and 8(a) Business Development Program participants have the same personal net worth threshold, and funds invested in an official retirement account are excluded from the assessment of an economically disadvantaged individual's personal net worth in both programs.



A Presumption of Eligibility for:

- 8(a) Companies

- SBA also accepts a current, valid 8(a) certification if the 8(a) owner(s) are women. Firms must provide their 8(a) certification, annual review letters, or acceptance letter if in their first year through beta.certify.sba.gov

- *CVE – verified veteran-owned small businesses

- SBA also accepts a current, valid CVE Verification if the owner(s) are women. Firms must submit evidence of verification by the Department of Veterans Affairs. through beta.certify.sba.gov



Are the 8(a) and CVE “Shortcuts”
Working?

Maybe

Maybe not



*Third Party Certifications (TPC)

- ▶ There are four organizations approved by 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](#)
 - ▶ [U.S. Women's Chamber of Commerce](#)
 - ▶ [Women's Business Enterprise National Council](#)
- ▶ Firms will need to provide proof of their third-party certification through beta.certify.sba.gov for initial processing. Read the instructions carefully to make sure you provide all the necessary information.



Is the TPC “Shortcut” Working?

Maybe

Maybe not






Before You Start:

- **Engage with your PTAC**
- beta.certify.sba.gov tips
 - Works with Google Chrome or Microsoft Edge
 - We don't recommend Safari, Internet Explorer or Firefox
- When the time comes to upload files
 - They must be PDF files
 - File names can only contain letters, numbers, dashes and underscores
 - Files must be smaller than 50 MB; cannot be zipped



Getting Started

- ▶ Review WOSB and EDWOSB NAICS Codes
 - ▶ <https://www.sba.gov/document/support--qualifying-naics-women-owned-small-business-federal-contracting-program>
- ▶ Is your primary code WOSB-eligible?
- ▶ What secondary codes should you list?
- ▶ Have your SAM up-to-date, particularly for NAICS
 - ▶ <https://www.sam.gov/SAM/>
- ▶ Have an active Login.gov account
 - ▶ <https://login.gov/>
- ▶ *Tip – set up multiple alternative two-factor authentication routes*



Check Your Eligibility and Understanding your Options

- If you know **for certain** that you're eligible, skip this step
- If you're not sure, you can take a simple test at: <https://beta.certify.sba.gov/am-i-eligible/>
- Certification Options https://www.sba.gov/sites/default/files/2020-06/SBA_WOSB_Table_508_v8.pdf



Gather Your Documents

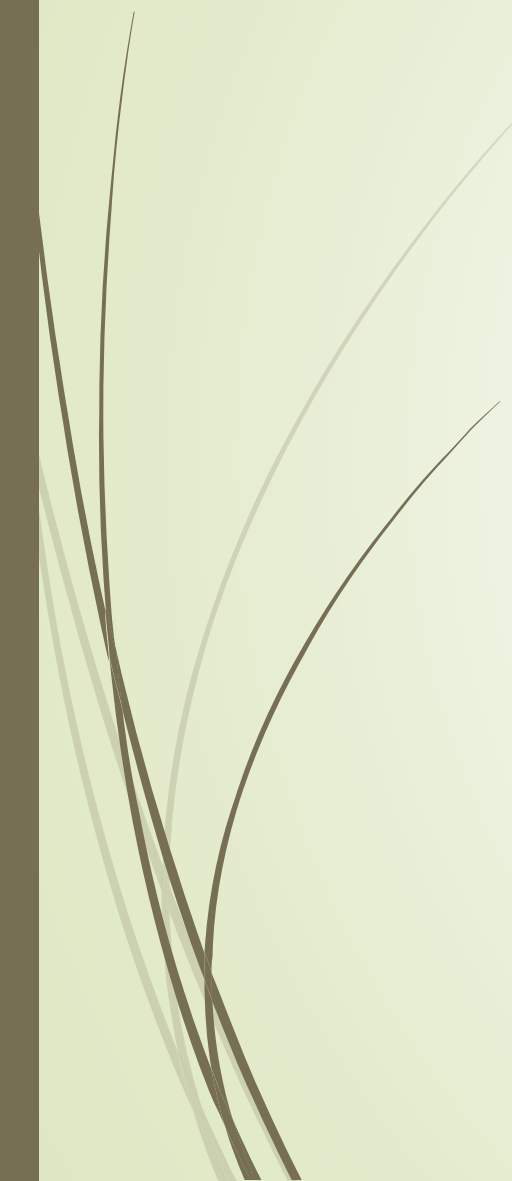
- For Document Checklists:

<https://beta.certify.sba.gov/prepare/>

- Passport or birth certificate – covers citizenship
- Corporate documents – proves ownership and control
 - Sole Proprietor, Partnership, LLC, Corporation
- Personal and corporate financial docs (**if seeking EDWOSB**)
- TPC, 8(a) or VOSB documents if applicable



Other Data You Will Need at Hand

- ▶ Your primary NAICS code (per SAM)
 - ▶ Annual Revenue for each of the last 3 or 5 years (can choose 3 or 5 year average)
 - ▶ Number of employees (past 12 months)
 - ▶ Documents (.pdf) proving citizenship
 - ▶ Resume showing managerial capability
- 



Create your Account, Claim Your Business and Log in

- <https://beta.certify.sba.gov/>
 - Log in with login.gov (same as you use for SAM and beta.SAM)
- Claim your Business
 - You will need DUNS, TIN and MPIN. (DUNS and TIN format is 9 digits, no spaces or dashes)
- Steps listed at <https://beta.certify.sba.gov/external-user-guide.pdf> - pages 4-12.



Eligibility

- Size
 - Business Type
 - Debarment
 - Citizenship
 - You can walk through these elements on pages 13-16 of the User Guide
- 



Delegates

“A delegate is a person enabled by the applicant to input responses and documents on the applicant’s behalf. **However, the applicant is directly responsible and must complete the application's attestation questions and electronically sign the application before submission.**”

See User Guide pages 16-17



Document Ownership by Women

Differs by Type of Entity

- Declaration
- EDWOSB – **this has been a problematic point**
- User Guide pages 18 – 24



Prior Certifications

- Detailed on User Guide Pages 25 – 28
 - 8(a)
 - Third Party
 - CVE



Ownership Control

- Explained on User Guide pages 28 – 30
- Relatively straightforward:
 - Highest officer
 - Managerial experience
 - Upload resume
 - Technical expertise or License?



Economic Disadvantage

- **User Guide Pages 30 – 52!!!**
- Only has value in certain NAICS
- **Do not** pursue this unless you need to! It's huge!
- Automatic for 8(a)
- NOTE: IRS Form 4506-T: Request for transcript – why? (IDK)



Personal Summary

- User Guide Pages 52 – 53
- Invitees - Individual Contributors
 - Relevant if multiple women owners to achieve 51%
 - If EDWOSB, must document that women owning 51% all qualify
 - If EDWOSB, must include spouse (if any)
- Invitees – Board Members
 - “Each individual participating on the board of the WOSB/EDWOSB firm must complete an application.”



Attestation and Submission

- User Guide Pages 57 – 60
- **Can only be done by the applicant** – not a delegate



Messages and Profile

- Messages - allows two-way communication with SBA
- Profile –
 - allows password changes, email additions
 - two-factor authentication methods, generate new backup codes
 - Can revoke SBA consent
 - Remembered browsers?
 - Account history



Help

- ▶ User Guide Pages 63 – 64
- ▶ Instructions are provided on how to use the “help” utility



Request for Information and Deficiency Letters

- ▶ User Guide Pages 65 – 67
 - ▶ You may receive requests for more information
 - ▶ Instructions on how to respond are detailed here



Helpful Resources

- ▶ FAQs

https://www.sba.gov/sites/default/files/2020-06/SBA_WOSB_FAQ_508_v10.pdf

- ▶ Knowledge base – **user guides**

<https://beta.certify.sba.gov/knowledgebase/>



User Guide “Cheat Sheet”

-an abridged table of contents.

- ▶ Create your Account, Claim Your Business and Log in – Pages 4 – 12
- ▶ Eligibility – Pages 13 – 16
- ▶ Delegates Pages 16 - 17
- ▶ Document Ownership by Women Pages 18 – 24
- ▶ Prior Certifications (8(a), TPC, CVE) – Pages 25 – 28
- ▶ Ownership Control – Pages 28 – 30
- ▶ Economic Disadvantage – Pages 30 – 52
- ▶ Personal Summary and Invitees – Pages 53 – 57
- ▶ Attestation and Submission Pages 57 - 60
- ▶ Messages and Profile Pages 60 - 63
- ▶ Help Pages 63 – 64
- ▶ Request for Information and Deficiency Letters Pages 65 - 67

beta.Certify Knowledge Base

Click on one of the articles below to get more information or use our search to find what you're looking for.

Search

Training Media

[WOSB/EDWOSB Apply and Submit](#)

[WOSB/EDWOSB Before You Apply](#)

User Guides

[WOSB Applicant User Guide](#)

Forms

[WOSB/EDWOSB Certify External Checklist](#)

[WOSB/EDWOSB Certify Quick Start Guide](#)

Support

[WOSB/EDWOSB Certification Options](#)

FAQs

[WOSB Third-Party Certifications](#)

[WOSB/EDWOSB Certify External FAQs](#)



Shameless Commercial:

- NH PTAC offers free assistance with all this & more.
- You must have a physical presence in New Hampshire.
- You have to sign up online.
- To continue “active client” status, you have to use us as a resource.

How do I get started with NH PTAC?

- Go to the website and answer our questionnaire (www.nheconomy.com/ptac)
- Give us a call at (603) 271-7581
- email us at: govcontracting@livefree.nh.gov
- Meet with us in Concord (currently via Zoom)
- Request a site visit – we'll come to you.

