

# WOSB | EDWOSB CERTIFICATION

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UPDATES, INFORMATION, ELIGIBILITY,  
AND PREPARATION



## OUR MISSION

*Our mission is to assist Missouri businesses to grow by obtaining federal, state and local government contracts, which will generate employment and improve the local economy.*

# REASONING FOR PTAC

The government is the world's largest customer!

They need to buy everything so they need “Responsible Contractors” who can provide quality products and services, a competitive price, and be able to deliver on time.

# WHO IS A “RESPONSIBLE CONTRACTOR?”

- Federal responsible contractor standards are:
  - Adequate financial resources (or ability to obtain)
  - Comply with delivery/performance schedule
  - Satisfactory performance record
  - Satisfactory record of integrity / ethics
  - Organization, experience, accounting & operational controls, technical skills
  - Production, construction & tech equipment and facilities
  - Sell products/services purchased by the government

# GUIDING PRINCIPLES OF ACQUISITION

1. Satisfy end user
2. Maximize use of commercial items
3. Use contractors with successful past performance
  - Have you performed similar work?
  - How well did you perform the work?
4. Promote competition
5. Minimize administrative costs
6. Conduct business with integrity and fairness
7. Fulfill policy objectives

## SMALL BUSINESS ASSISTANCE

**PTAP – Procurement Technical Assistance Program** was created by Congress in 1985 to assist businesses entering into the government procurement arena

**PTAC – Procurement Technical Assistance Centers** were created to assist small businesses with government contracting issues

- Federal government agencies have small business goals
  - By Fiscal Year End 2019 to exceed 23%
  - However, some federal agencies do not meet their agency specific small business contracting goals
- Federal prime contractors have small business subcontracting participation goals as well.

## ACRONYMS (JUST A FEW)

SAM	System for Award Management
SBA	Small Business Administration
DUNS	Dun & Bradstreet
CFR	Code of Federal Regulations
FAR	Federal Acquisition Regulation
DFAR	Defense FAR Supplement
VAAR	VA Acquisition Regulation
NAICS	North American Industry Classification System
PSC	Product Service Code
FSC	Federal Supply Code
NSN	National Stock Number

# FEDERAL CONTRACTS TO SMALL BUSINESSES

Category	SB Contract \$ (in Billions)	Percentage of Total Dollars	% Goal
Government-Wide Small Business	\$16.8	21.48%	23%
Small Disadvantaged Business, including 8(a)	\$5.7	7.39%	5%
Service-Disabled, Veteran-Owned Small Business	\$2.9	3.80%	3%
Woman Owned Small Business	\$2.9	3.71%	5%
HUBZone	\$1.0	1.35%	3%

# REGISTRATIONS

- Federal
  - System for Award Management (SAM) <https://www.sam.gov>
  - SBA Profile or Dynamic Small Business Search [http://web.sba.gov/pro-net/search/dsp\\_dsbs.cfm](http://web.sba.gov/pro-net/search/dsp_dsbs.cfm)
  - Veteran and Service-Disabled Veteran-Owned Small Business (SDVOSB) <https://www.vip.vetbiz.va.gov/>
- Individual Buying Offices
  - FEMA <https://www.fema.gov/small-business-program>
  - Federal Reserve Bank <https://www.federalreserve.gov/secure/vendorregistration/>
- State of Missouri
  - Office of Administration [https://oeo.mo.gov/oeo\\_certifications/](https://oeo.mo.gov/oeo_certifications/)
- City of St. Louis – St. Louis Lambert Airport <http://www.flystl.com/bdd>
- Other local counties, cities, public institutions
- Prime Contractors often have their own vendor registrations

# CERTIFICATIONS

## FEDERAL

- 8(a) Business Development Program
- HUBZone
- Woman Owned Small Business (WOSB)
- Economically Disadvantaged Woman Owned Small Business (EDWOSB)
- Veteran Owned Small Business (VOSB)
- Service Disabled Veteran Owned Small Business (SDVOSB)

## STATE

- Minority Business Enterprise (MBE)
- Woman Business Enterprise (WBE)
- Disadvantaged Business Enterprise (DBE)
- Missouri Service Disabled Veteran Enterprise (SDVE)

## State of Missouri - URLs

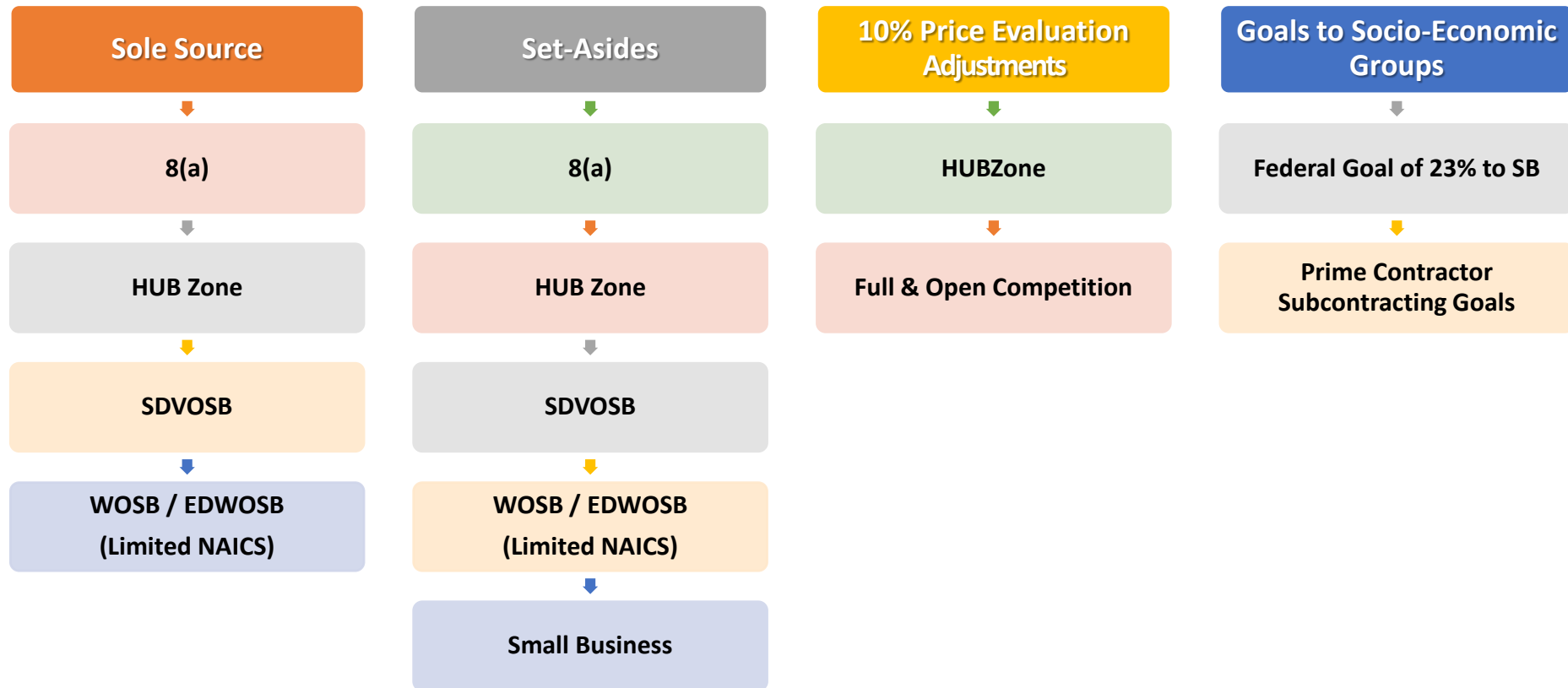
Office of Administration

[https://oeo.mo.gov/oeo\\_certifications/](https://oeo.mo.gov/oeo_certifications/)

City of St. Louis – St. Louis Lambert Airport

<http://www.flystl.com/bdd>

# BENEFITS OF FEDERAL CERTIFICATIONS



# UPDATES & CHANGES

## NEW LEGISLATION

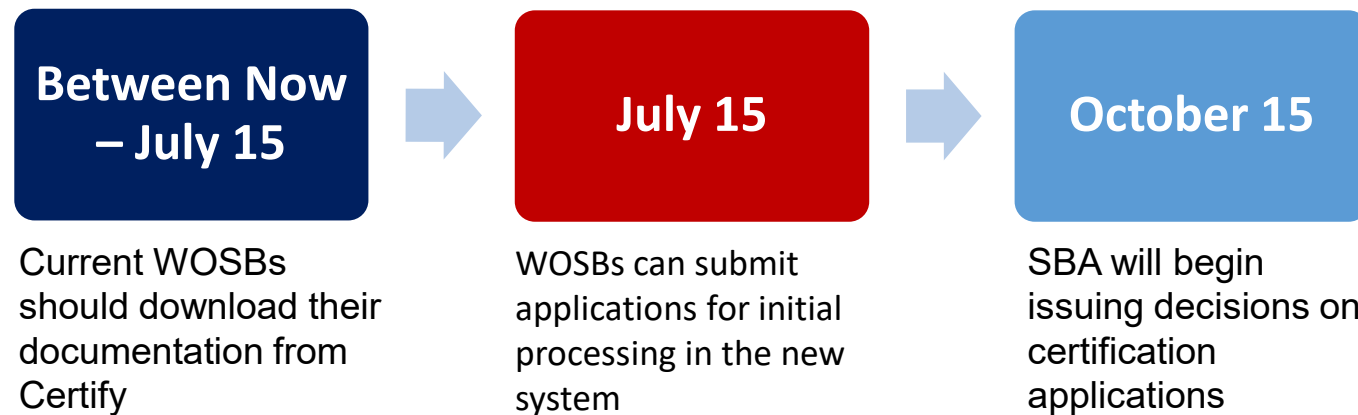
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## CHANGES GOING INTO EFFECT

- The final rule was published in the Federal Register on May 11, 2020. This final rule fully details changes to the certification process. Please note it contains two separate effective dates: July 15 and October 15.
- Once the changes go into effect:
  - WOSBs may apply through the SBA's FREE online certification platform or go through an approved third-party entity at a cost. SBA will accept certification from current and active 8(a)s or CVE certified firms. WOSB can also apply for certification through an approved third-party certifier for a fee.
  - Women-owned small businesses that are not certified for SBA's WOSB Federal Contract Program may continue to identify as women-owned small businesses in SAM.gov, receive contract awards outside the Program, and these awards can count toward an agency's goal for awards to WOSBs.

# TIMELINE

- SBA is updating the WOSB Program timeline
  - Due to information technology and staffing resources being reallocated to the Coronavirus pandemic response
- As a result, the following are key dates for SBA stakeholders and small business firms to keep in mind:



- Note: Self-certification will remain available for firms via [certify.sba.gov](https://certify.sba.gov) until October 15.

# WOSB PROGRAM CHANGES

- Self certification will continue until October 15. SBA will still accept TPC valid certificates will continue to demonstrate as evidence for self-certification.
- October 15th:
  - Program applicants will submit via the new platform
  - SBA has 90 days to process a complete application
  - WOSB Program Analyst will complete review of the application entirely within the new certification system.
  - SBA will issue a formal letter of approval or decline
  - A declined applicant may reapply after 90 days if it has corrected the initial defect. There is no formal appeal process for applications.
- SBA is working with SAM.gov to incorporate program participant's WOSB/EDWOSB certification onto a company's profile. COs will no longer need to request access to review a firm's documents.

## THIRD-PARTY CERTIFIERS

- After October 15, third party certificates will provide demonstration of evidence for the certification process.
- Between July 15 and October 15, all firms, including those with TPC certificates, should create a new account in the new platform and submit an application by uploading their TPC certificate to SBA for initial processing.
- Current SBA Approved TPCs:
  - [El Paso Hispanic Chamber of Commerce](#)
  - [National Women Business Owners Corporation](#)
  - [US Women's Chamber of Commerce](#)
  - [Women's Business Enterprise National Council](#)

# THIRD-PARTY CERTIFICATION

## **National Women's Business Owners Corporation (NWBOC)**

- Fee: \$400
- Processing Time: 6-8 Weeks
- Completed Application required before beginning process

## **Women's Business Enterprise National Council (WBENC)**

WOSB Certification through WBENC is free and very quick.

- Membership Starts: \$350-\$1250 (based on income)
- Processing Time: 90 Days
- Application be completed after document production, as it is done online and has a 90-day deadline from start to finish—and once it is submitted, no changes can be made.

## **The U.S. Women's Chamber of Commerce**

USWCC offers WOSB and EDWOSB third-party certification, to both its members and non-members.

- Fee: \$275
- Processing Time: 15-30 Days
- Requires the application be completed in one sitting—it cannot be completed partially and saved to be completed later.

## OTHER PROGRAM CHANGES

- Other Certifications:
  - Individuals certified by the U.S. Department of Veterans Affairs Center for Verification and Evaluation may submit their most recent certification along with documentation showing they are owned and controlled by one or more women to receive WOSB/EDWOSB certification.
  - Current 8(a) firms may submit their most recent annual review letter, or their program acceptance letter for firms in their first year. 8(a) certification satisfies the qualification for EDWOSB.
- Effective July 15, updated and aligned 8(a) and EDWOSB standards for economic disadvantage
  - Funds invested in an Individual Retirement Account (IRA) or other official retirement account will not be considered in determining the individual's net worth.

# WOSB CONTRACTING CHANGES

- On October 15<sup>th</sup>, Contracting Officers will no longer have to verify a WOSB firm's documentation. Program participation will be displayed on the firm's SAM.gov profile.
- As outlined in the rule, SBA will expedite an application if a firm is considered an apparent awardee for a contract. Application review will be completed within 15 calendar days. More details on this process forthcoming.
- The current [WOSB Contract Administration Page](#) will be updated to help guide federal acquisition professionals.
- For solicitations posted prior to Oct 15<sup>th</sup>, firms fulfilling self-certification requirements are eligible.
- For solicitations posted on or after Oct 15<sup>th</sup>, firms must receive formal certification from SBA.

## STAYING UP TO DATE ON CHANGES

- For the most current information and resources about the WOSB and EDWOSB certification process, visit [sba.gov/wosbready](https://sba.gov/wosbready).
  - Firms can contact their local [SBA regional and district office](#), SBA resource partner, or a Procurement Technical Assistance Center (PTAC) with questions.
- SBA's WOSB website also has the latest [FAQ](#) and [certification options table](#) for more information.
- SBA will continue to inform firms within [Certify.SBA.gov](https://Certify.SBA.gov) of relevant changes

# WOSB & EDWOSB CERTIFICATION

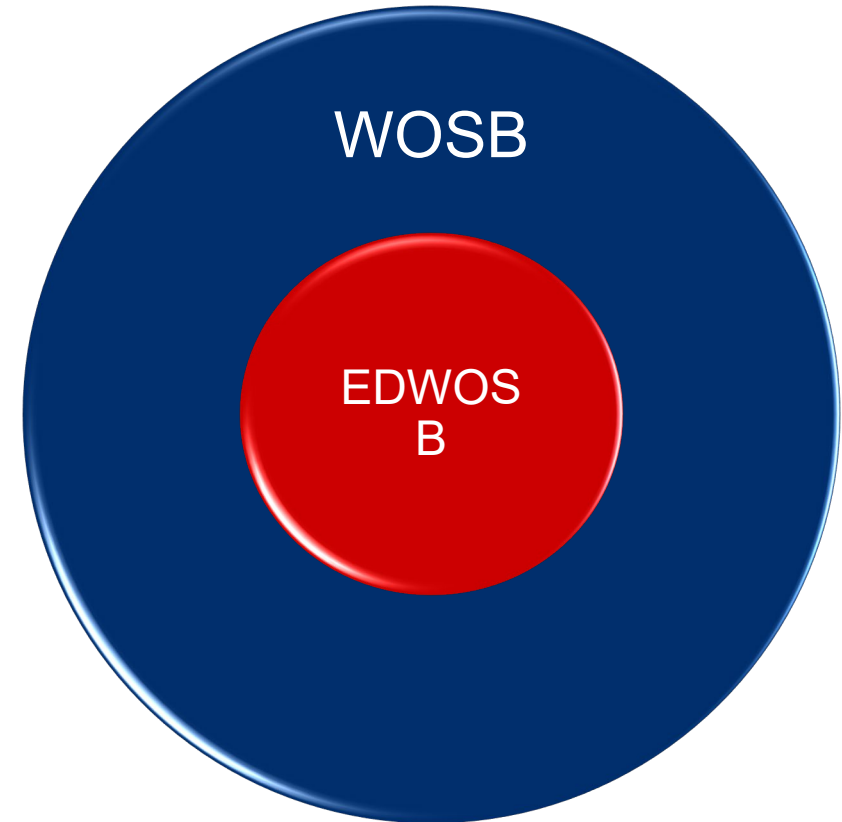
## CHECK LIST

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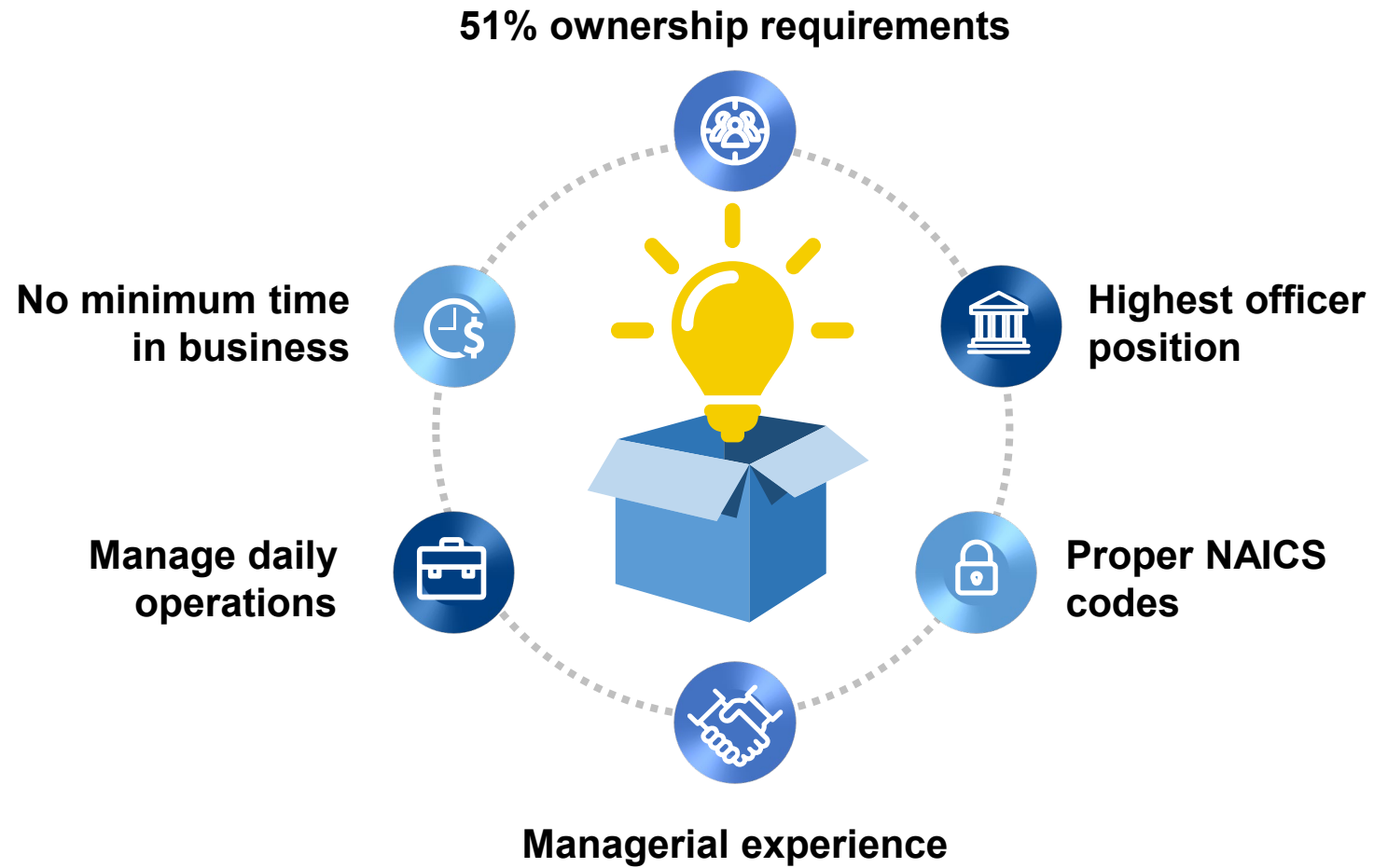
## WOSB AND EDWOSB

- **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.



# WHAT IS THE SAME



## WOSB – ELIGIBILITY

To be eligible for the women's contracting program, your business must:

- Be a [small business](#)
- Be at least 51% owned and controlled by women who are U.S. citizens
- Have women manage day-to-day operations and also make long-term decisions.
- Active registration in the System for Award Management for the firm, available at [SAM.gov](#)
- Proof of U.S. citizenship for qualifying individual(s)
- Resume (optional)
- Joint Venture agreements if applicable

## EDWOSB – ELIGIBILITY

- To qualify as an **economically disadvantaged business** within the women's contracting program, your 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

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\(CFR\)](#). You can also get a preliminary assessment of whether you qualify at the [SBA's Certify website](#).

# UNIQUE ASPECTS OF WOSB FEDERAL CONTRACTING

## Limited NAICS Codes

- Not all NAICS codes are authorized for use under the WOSB program. Check the SBA website at [www.sba.gov/wosb](http://www.sba.gov/wosb) for available NAICS codes.

## Documentation

- WOSBs must provide their eligibility documents to the WOSB Program Repository.

## Verification

- Contracting Officers must verify whether offerors have provided all the required documents.

# CERTIFICATION PROCESS

## DOCUMENTS

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# COMPANY DOCUMENTATION

## **Corporation**

- Articles of Incorporation
- Copies of stock certificates (front and back)
- Stock Ledger
- Corporate Bylaws and any amendments

## **Limited Liability Company (LLC)**

- Operating Agreement and any amendments
- Articles of Organization and any amendments

## **Partnership**

- Partnership Agreement and any amendments

## **Sole Proprietor**

- DBA (Doing Business As) or Trade Name Certificate

# QUALIFYING AS A WOSB OR AN EDWOSB

## Self Certification with Supporting Docs

- Register in SAM
- Compile and provide documents to WOSB Program Repository
- Represent status as WOSB or EDWOSB in SAM

## Third-Party Certification with Supporting Docs

- Register in SAM
- Obtain certification from SBA-approved third-party certifier (TPC)
- Provide TPC certification to WOSB Program Repository
- Represent status as WOSB or EDWOSB in SAM

## 8(a) Certification with Supporting Docs

- Register in SAM
- Obtain 8(a) certification from SBA
- Provide 8(a) certification to WOSB Program Repository
- Represent status as WOSB or EDWOSB in SAM

## SELF-CERTIFIED DOCUMENTS - WOSB

Corporation	LLC	Partnership	Sole Proprietorship
Birth certificate, naturalization paper, or unexpired passport of women who own and control the firm			
WOSB Certification Questionnaire (Certify equivalent of SBA Form 2413)			
Articles of incorporation	Articles of organization	Partnership agreement	DBA name certificate
By-laws	Operating agreement		
Stock certificates			
Stock ledger			
Voting agreements, if any			
DBA name certificate, if applicable			

# SELF-CERTIFIED DOCUMENTS – EDWOSB

Corporation	LLC	Partnership	Sole Proprietorship
Birth certificate, naturalization paper, or unexpired passport of women who own and control the firm			
EDWOSB Certification Questionnaire (Certify equivalent of SBA Form 2414)			
Personal financial statement (Completed online—equivalent to SBA Form 413)			
Articles of incorporation	Articles of organization	Partnership agreement	DBA name certificate
By-laws	Operating agreement		
Stock certificates			
Stock ledger			
Voting agreements, if any			
DBA name certificate, if applicable			

Corporation	LLC	Partnership	Sole Proprietorship
WOSB or EDWOSB Certification Questionnaire (Certify equivalent of SBA Form 2413 or 2414)			
Current TPC Certification			

SBA accepts WOSB or EDWOSB certifications only from the following four entities:

- El Paso Hispanic Chamber of Commerce
- National Women Business Owners Corporation
- U.S. Women's Chamber of Commerce
- Women's Business Enterprise National Council: WOSB only

**No USDOT DBE or State certifications are accepted.**

# 8(A) CERTIFICATION - DOCUMENTS

Corporation	LLC	Partnership	Sole Proprietorship
EDWOSB Certification Questionnaire (Certify equivalent of SBA Form 2414)			
Initial 8(a) Approval Letter			
Most Recent Annual Review Letter from SBA			

Certifications of eligibility in the 8(a) BD Program also satisfy eligibility requirements for the WOSB program.

# CERTIFY.SBA.GOV


## THE PROCESS

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## CHANGES TO REMEMBER

- The current self-certification process will remain available for firms until October 15, 2020, in [certify.sba.gov](https://certify.sba.gov) & COs will still have to verify a WOSB firm's documentation.
- On October 15, 2020 Contracting Officers will no longer have to verify a WOSB firm's documentation. Program participation will be displayed on the firm's SAM.gov profile

# CERTIFY.SBA.GOV HOME PAGE

 An official website of the United States government: [Here's how you know](#)

certify.SBA.gov

Login


Home

Prepare

Am I eligible?

Help

COVID-19 Guidance



**Welcome to certify.SBA.gov**

The U.S. Small Business Administration (SBA) is modernizing the certification management experience. Manage your 8(a) program certification and your eligibility documentation for the Women Owned Small Business and All Small Mentor-Protégé programs online from our easy-to-use dashboard. **Get started today!**

Login

Or

Get started

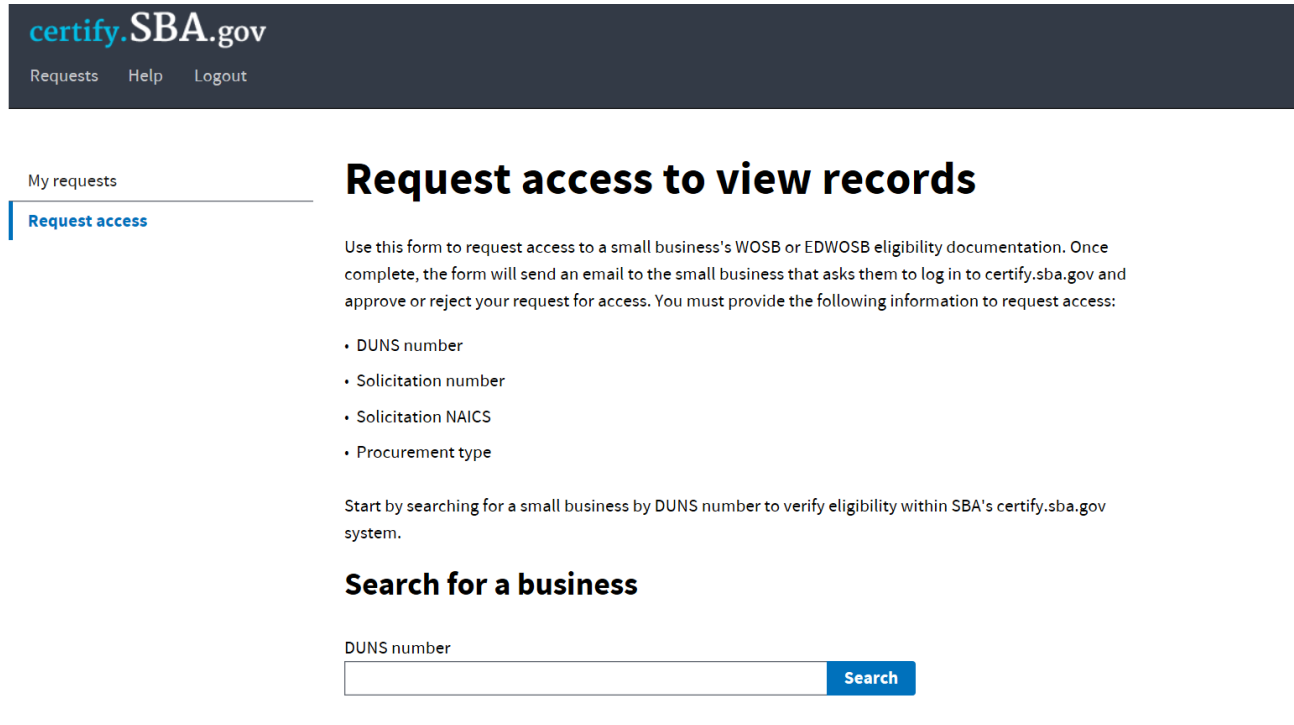
[Federal government employees: Login or create an account](#)

Am I Eligible?

Have Program-Specific Questions?

# STEPS TO ACCESS DOCUMENTS

1. Click on [Request Access](#) link on the left navigation bar.



The screenshot shows the 'certify.SBA.gov' website. The top navigation bar includes 'Requests', 'Help', and 'Logout'. On the left, a sidebar shows 'My requests' with 'Request access' selected. The main content area is titled 'Request access to view records' and contains instructions, a list of required information (DUNS number, Solicitation number, Solicitation NAICS, Procurement type), and a search section for a business by DUNS number.

**certify.SBA.gov**  
Requests Help Logout

My requests  
**Request access**

## Request access to view records

Use this form to request access to a small business's WOSB or EDWOSB eligibility documentation. Once complete, the form will send an email to the small business that asks them to log in to [certify.sba.gov](#) and approve or reject your request for access. You must provide the following information to request access:

- DUNS number
- Solicitation number
- Solicitation NAICS
- Procurement type

Start by searching for a small business by DUNS number to verify eligibility within SBA's [certify.sba.gov](#) system.

### Search for a business

DUNS number

**Search**

# CONTINUED

2. Search for a WOSB firm by entering a DUNS number in the text box and click the *Search* button.

certify.SBA.gov

Requests Help Logout

My requests

Request access

Request access to view records

Use this form to request access to a small business's WOSB or EDWOSB eligibility documentation. Once complete, the form will send an email to the small business that asks them to log in to certify.sba.gov and approve or reject your request for access. You must provide the following information to request access:

DUNS number

Solicitation number

Solicitation NAICS


Procurement type

Start by searching for a small business by DUNS number to verify eligibility within SBA's certify.sba.gov system.

Search for a business

DUNS number

Search



Missouri  
Procurement  
Technical Assistance  
Centers

# CONTINUED

3. Complete the request form by entering the *Solicitation number* and *NAICS* fields, and select the *Type of procurement* box

- a. Read the authorization text
- b. Click the *I accept* box
- c. Click the *Request Access* button

## Complete your request

Please enter the Solicitation number, Solicitation NAICS, and procurement type below.

Solicitation number

6545432

Solicitation NAICS

343435

Type of procurement:

- ☐ WOSB set-aside
- ☐ EDWOSB set-aside
- ☒ WOSB sole source
- ☐ EDWOSB sole source

I Montana Nguni certify that I am a Federal Contracting Officer or Specialist and am authorized by Small Business Administration to validate Women-Owned Small Business (WOSB) eligibility in order to award contracts to women-owned small businesses. I understand that the data that I am requesting contains Personal Identifiable Information (PII) and must be protected in accordance with [OMB Memorandum M-07-16 Safeguarding Against and Responding to the Breach of Personally Identifiable Information](#).

☒ I accept

Request Access

CONTINUED

- 4. Log in to certify.SBA.gov
- 5. Click the *My Requests* link on the left navigation bar.

My requests

Request access

My requests

Review vendor certifications

Search

Solicitation #	DUNS #	Vendor	Status	Request expires	Access expires ▲	View
765345243	275276652	Entity 37 Legal Business Name	Accepted	08/05/2016	10/27/2016	WOSB, EDWOSB
2345678	245652494	Entity 70 Legal Business Name	Accepted	08/05/2016	10/27/2016	WOSB, EDWOSB
3456765	245652494	Entity 70 Legal Business Name	Accepted	08/08/2016	10/30/2016	WOSB, EDWOSB
6545432	245652494	Entity 70 Legal Business Name	Requested	08/09/2016		

Return to top

Your experience is important to us. Please email us at [certify@sba.gov](mailto:certify@sba.gov) with comments or suggestions.

If contractor has not completed registration, the View column will be blank.

# CONTINUED

6. In the View column, select which certification you would like to see using the [WOSB](#) or [EDWOSB](#) links.

[My requests](#)  
Request access

## My requests

### Review vendor certifications

[Search](#)

Solicitation #	DUNS #	Vendor	Status	Request expires	Access expires ▲	View
765345243	275276652	Entity 37 Legal Business Name	Accepted	08/05/2016	10/27/2016	WOSB, EDWOSB
2345678	245652494	Entity 70 Legal Business Name	Accepted	08/05/2016	10/27/2016	WOSB, EDWOSB
3456765	245652494	Entity 70 Legal Business Name	Accepted	08/08/2016	10/30/2016	WOSB, EDWOSB
6545432	245652494	Entity 70 Legal Business Name	Requested	08/09/2016		

[Return to top](#)

Your experience is important to us. Please email us at [certify@sba.gov](mailto:certify@sba.gov) with comments or suggestions.

## CONTINUED

7. Review the self-certification summary.
8. To view the supporting documents, click on the *file name* link.

### LLC

Do the Articles of Organization, Operating Agreements and any amendments show that at least 51% of each class of member interest is unconditionally and directly owned by the qualifying individual(s)?

**Response:** Yes

#### Attachments:

File Name	Document Type	Upload Date
<a href="#">SOS2012_2016.pdf</a>	Amendments to the Articles of Organization	04/04/2016
<a href="#">SOSAofOAlta.pdf</a>	Articles of incorporation	04/04/2016

Do the Articles of Organization and any amendments or Operating Agreement and any amendments show that the qualifying individual(s) serve as management members, with control over all decisions of the limited liability company?

**Response:** Yes

#### Attachments:

File Name	Document Type	Upload Date
<a href="#">Alta PA2 07_30_13 Signed.pdf</a>	Miscellaneous	04/04/2016

## CONTACT THE SBA

### Visit the SBA's website for more information.

- Businesses: [www.sba.gov/wosbready](http://www.sba.gov/wosbready)
- COs: <https://www.sba.gov/partners/contracting-officials/contracting-program-administration/wosb-program-administration>
- For questions on the WOSB program, email [wosb@sba.gov](mailto:wosb@sba.gov).
- For technical questions on Certify.SBA.gov, please email [help@certify.sba.gov](mailto:help@certify.sba.gov).

*Thank you for participating in this event!*



[missouribusiness.net/ptac](http://missouribusiness.net/ptac)

Missouri Business Development  
Program

UNIVERSITY OF MISSOURI  
 Extension



Missouri PTAC is funded in part through a cooperative agreement with the Defense Logistics Agency.