

Welcome to WOSB!: Program Overview and Pre-application Webinar

We will start in 5 minutes
Please go to <u>wosb.certify.sba.gov</u>

WOSB.Certify.SBA.gov

On the homepage, you can:

- ✓ Access checklists that provide guidance prior to applying
- ✓ Verify eligibility
- ✓ Find answers to questions regarding your firm's ability to participate in a program
- ✓ Request information from SBA via the Help form
- ✓ Create an account and proceed with your application
- ✓ Access the <u>Knowledge Base</u>, which includes training videos, user guides, and more



The Women-Owned Small Business Federal Contract Program (WOSB Program) is to help provide a level playing field for women business owners. The federal government limits competition for certain contracts to businesses that participate in the WOSB Program.

These contracts are specific industries where WOSBs are







Using Prepare Tab to Apply



WOSB.Certify.sba.gov

Home Prepare Should I Apply? Knowledge Base Help

SBA Employees Only

Prepare to apply for the Woman Owned Small Business (WOSB) Program

These checklists identify the documents that applicants will be required to submit in the application process. The beta. Certify application process is easier when applicants gather these documents before starting the application. Within the checklists outlined below the required documents have been organized by the "cards" that will be filled out

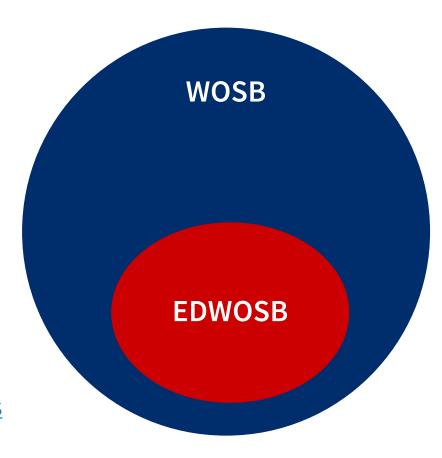
Here you will find:

- ✓ Checklists to guide you through the process
- ✓ Information on the documents you will need as you begin



What's the Difference between 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.
- There are 733 <u>industry specific NAICS codes</u> for WOSB (626) and EDWOSB (107).





Is WOSB Certification Appropriate for You?



Managerial experience



Highest office position



Proper NAICS codes



51% ownership requirements



Management of daily operations



No minimum time in business



Economically Disadvantaged (EDWOSB) Requirements to Qualify



Personal net worth (assets minus liabilities) less than \$850,000



Three-year average income is \$400,000 or less



Fair market value of all assets is \$6.5 million or less



Getting Started

1. Register in the System for Award Management (SAM)

- Your firm must have an active registration in <u>SAM.gov</u>.
- Ensure your firm's SAM profile has been accurately updated in the last 12 months.
- Your SAM.gov registration should be set for the purposes of "All Awards" and not limited to "Loans and Grants."

2. Create Your SBA Account

- You will need a login.gov account to use <u>WOSB.Certify</u>. Be sure to enter the same email address into your SBA Connect profile.
- When you list someone as a delegate in SBA Connect, you will be asked to provide an email address for them. When they register in SBA connect, they must use this same email address.
- You must enter the firm owner's *legal name* into the SBA Connect profile.

3. Claim your business at WOSB.Certify

- You will be asked to enter your firm's UEI, EIN, and bank account information from SAM.gov to claim your business and begin your WOSB Federal Contract Program application.
- The Majority Woman Business Owner or other designated Woman Business Owner must claim the business.
- When creating your SBA connect account, individual contributors must use the **same email address** that was used by the primary owner to claim the business on SAM.





Top 3 Steps to Remember





Pending or Draft Status: How to Submit my Application

Once all the required information and the documents are submitted, the user must submit the application to SBA by attesting the Program Self-Certification Summary. This can only be done by the applicant. Follow the instruction below to complete the attestation:

- 1. Navigate to the Application Overview page
- 2. Click the 'Individual Contributors' link
- 3. Navigate to Invitee section
- 4. Click the 'Next' button
- 5. Read and complete the declaration form by selecting each checkbox
- 6. Click the 'Attest and Submit' button

Please Note: To be able to Attest and Submit your application, you will need to have completed all parts of your application including the Firm Owner Questionnaire for your application to be found within the Individual Contributor Card.

See <u>article</u> for more information.





WOSB Application Process

- Firm registers in SAM.gov, SAM account must be ACTIVE
- Firm registers in wosb.certify.sba.go v and claims business
- Firm completes
 application on
 wosb.certify.sba.go
 v and uploads
 appropriate
 documents for
 WOSB or EDWOSB

- SBA receives submission and verifies receipt of all documents
- Notifies firm of complete application
- If invalid or missing document(s), prescreener issues a deficiency letter returning the application or submits request for information (RFI).
- Reviews eligibility, ownership, and control—90-day process begins
- Reviews financials for EDWOSB
- May conduct request for information (RFI)
- Submits a final recommendation
- Listed in DSBS as PENDING

- Makes final decision to approve or deny
- Issues signed and dated letter to firm
- Letter marks official date of entry into WOSB program

SUBMISSION OF APPLICATION

SCREENING STAGE PROCESSING STAGE

DIRECTOR DECISION



Common Reasons for RFI/Return

1. Missing the Filed Articles of Organization or Articles of Incorporation:

- Firms often incorrectly submit a Certificate of Filing. The document must be the official Certificate of Filing that includes the certification with the date of filing, in some instances a stamp (with date and time).
- If an owner is having difficulty locating this document, they can search for it by visiting the Secretary of State Business Entity Search for the state in which the firm has been registered.

2. Governing documents have not been properly executed:

- If your firm structure requires an Operating Agreement such as an LLC, please ensure that the document is signed and dated by all members at time of document submission.
- If your firm is a corporation, please submit the bylaws. If the bylaws have not been signed, SBA will need a copy of the minutes of the meeting during which the bylaws were adopted. Each of these documents must be signed by relevant parties and dated.

3. Incomplete Resume:

- Please do not submit a biography or capability statement.
- Please ensure your resume includes:
 - Name.
 - Work history (to include the applicant firm) in chronological order that includes start and end dates, including the present date where applicable.
 - Titles/positions and duties performed for each employment or ownership.
 - Education and/or licenses.
- **Note**: if you have current outside employment or ownership, please include a Letter of Explanation (LOE) that includes: the business hours of the applicant firm; the days of the week and hours of the day dedicated to the applicant firm; and the days of the week and hours of the day dedicated to outside employment or ownership.
- See video for more information.





SBA Resource Partners

SBA's Resource Partners are available nationwide to offer additional education and support to small businesses:

- Small Business Development Centers (SBDCs)
- Women Business Centers (WBCs)
- SCORE (mentors and coaching)
- Veteran Business Opportunity Centers (VBOCs)
- <u>Apex Accelerator</u> (formerly known as Procurement Technical Assistance Centers (PTACs))

Find the SBA District Office and Resource Partner closest to you

at SBA.gov/LocalAssistance





SBA-Approved Third-Party Certifiers (TPCs)

SBA-approved Third-Party Certifier (TPC) issuers:

- When uploading a certificate issued by an approved third-party certifier, be sure to upload the ED/WOSB certificate, NOT one applying to WBE or any other non-WOSB certification.
- Please note there are fees associated with using TPCs.

SBA-approved TPCs:

- El Paso Hispanic Chamber of Commerce
- National Women Business Owners Corporation
- <u>U.S. Women's Chamber of Commerce</u>
- Women's Business Enterprise National Council



Training Resources

- <u>Document preparation checklist</u> for WOSB and EDWOSB certifications
- Eligibility check questionnaire
- WOSB.Certify.SBA.gov Knowledge Base





Contact Us

- For more information and event alerts, go to: <u>www.sba.gov/wosbready</u>
- For WOSB Federal Contracting Program training inquiries, email: <u>WOSB@sba.gov</u>
- Technical help requests for WOSB.certify.sba.gov can be submitted via the "help" tab at: https://wosb.certify.sba.gov/help/





Helpful Hints

- Please monitor your email so as not to miss important deadlines, updates, and requests from the WOSB team!
- When uploading your documents, please only upload PDFs and ensure that your documents are NOT password-protected.
- Please note our average processing time from submission of your application to rendering a decision is 8 months.
- If you don't hear from us in 120 days, that does **not** necessarily indicate an issue with your application.
- We might send you a <u>Request for Information (RFI)</u>. On average, you will have 5-7 days to respond to an RFI. Make sure to note the due date **bolded** in the RFI letter.







U.S. Small Business Administration