

U.S. Small Business Administration





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Today's Breakout Rooms



Woman-Owned Small Business Certification

Desiree Albrecht



Veteran-Owned Small Business Certification

Melanie Norton



Historically Underutilized Business Zone (HUBZone) Program

Fernando Cervantes



8(a) Program Business Development Program

Ana Singh



Breakout Sessions

Contact the Business Opportunity Specialist Team



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U.S. Small Business Administration

8(a) Business Development Program

Ana Singh - Seattle SBA District Office

8(a) Business Development Program



Nine-year program created to help socially and economically disadvantaged entrepreneurs gain access to—and succeed in—the federal marketplace

Build capacity and grow through contracts

Access to business development support



Program Overview

- Businesses that participate in the 8(a) BD Program receive training and technical assistance, business development services, exclusive access to reserved federal contracting opportunities, and a unique opportunity for direct contract awards.
- Federal contracting officers see 8(a) certification as a valuable asset. They understand that 8(a) certification represents exclusive access to uniquely qualified small disadvantaged business entrepreneurs who are ready to do business with the federal government.





Benefits

- Efficiently compete and receive set-aside and sole-source contracts
 - \$7M manufacturing and \$4.5M for all other acquisitions
- Receive one-on-one business development assistance for their nine-year term from dedicated Business Opportunity Specialists focused on helping firms grow and accomplish their business objectives
- Pursue opportunity for mentorship from experienced and technically capable firms through the SBA Mentor-Protégé program
- Connect with procurement and compliance experts who understand regulations in the context of business growth, finance, and government contracting
- Pursue joint ventures with established businesses to increase capacity
- Qualify to receive federal surplus property on a priority basis
- Receive free training from SBA's 7(j) Management and Technical Assistance program





Eligibility Requirements

- Be a small business (as defined by https://www.sba.gov/size-standards)
- Not have previously participated in the 8(a) BD program
- Be at least 51 percent owned and controlled by U.S. citizens who are socially and economically disadvantaged
- Have a personal net worth of less than \$850K, adjusted gross income of \$400K or less, and assets totaling \$6.5 million or less
- Have all its principals demonstrate good character
- Demonstrate the potential for success such as having been in business for two years
- Have the owner manage day-to-day operations and also make long-term decisions



Two Years in Business

SBA requires a business to be operating for at least two years in order to qualify for the 8(a) BD Program.

SBA may **waive** the two year rule if you have:



Business management experience



Technical expertise



Adequate capital



Successful past performance



Ability to meet requirements



Designated Socially Disadvantaged Criteria

Designated Groups

- Black American
- Asian Pacific American
- Hispanic American
- Native American
- Subcontinent Asian American

Non-Designated Group Criteria

- Preponderance of evidence
- Race, ethnicity, gender, physical handicap, long-term environmental issues
- Chronic and substantial social disadvantaged
- Negative impact to business advancement



Economically Disadvantaged Requirements to Qualify



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



Adjusted gross income of \$400k or less



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

*Personal net worth excludes equity in business, personal primary residence, funds reinvested in IRA, or other legitimate retirement accounts



Is Your Business 8(a) Ready?



Does the government... buy what you sell?

Do you have... federal contracting experience, cash, inventory, working capital?

Are you capable... of fulfilling a government contract?

Do you know... where to find contracting opportunities?



When Should You Apply?

Are You Ready?

- Do you have the **<u>CAPACITY</u>** to deliver on federal contracts?
- Do you have sufficient **CASH FLOW**?
- Do you have demonstrated **<u>CAPABILITY</u>** (past performance)?
- Can you demonstrate successful **PAST PERFORMANCE**?
- Are you open to **ADVICE** on growing your business?

Yes NO Don't know

Some firms may be eligible for the 8(a) BD Program, but they are not ready to contract with the federal government.

Businesses interested in applying for 8(a) certification can get a preliminary assessment of whether the 8(a) BD Program is right for them by using the "Am I Eligible" tool on the <u>https://certify.sba.gov/am-i-eligible</u>.



How to Apply

- <u>Get local assistance</u> and find out if you are ready to apply by meeting with an SBA BOS or Procurement Technical Assistance Center counselor.
- Register your business in the <u>System for Award Management</u> (SAM).
- Make sure to apply for 8(a) certification at <u>certify.sba.gov</u>. Before you start, visit the Knowledge Base on the Certify website where you can find helpful resources including the application guide to assist with gathering necessary documentation, as well as completing and submitting your application.



Monthly Call – Eligibility Assistance

Members of the 8(a) team answer questions on a monthly basis to help firms navigate the certification process, including program benefits and eligibility requirements for 8(a) certification.

When	Third Wednesday of each month - 2:00p.m. to 3:00p.m. (ET)
How	Call 202-765-1264 (Washington, DC) and enter phone conference ID#: 217 121 169



Helpful Resources for Small Businesses

- PTAC <u>https://www.aptac-us.org/</u>
 - PTAC's assist with government contracting from A-Z.
- Contact their <u>local SBA office</u> to learn more about 8(a) BD Program and how to apply.
- Visit the SBA <u>website</u> or email <u>8aquestions@sba.gov</u> for general information.
- Visit the <u>Certify Help Desk</u> for technical questions as it relates to their 8(a) application.
- Call SBA with program eligibility questions at:
 - Eastern Processing Office: 610-382-3062
 - Western Processing Office: 415-744-0328
- Visit SBA's Federal Contracting page at <u>www.sba.gov</u> for contracting assistance program updates.
- Go to certify.sba.gov and visit the **Certify Knowledge Base** for all tools, FAQs, and program information for 8(a), Mentor-Protégé, WOSB, and HUBZone.





QUESTIONS?



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U.S. Small Business Administration

HUBZone Certification

Historically Underutilized Business Zone (HUBZone) Certification



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Stimulate capital investment

Build capacity and grow

Access HUBZone set-aside contract dollars

HUBZone Program Purpose



Is the HUBZone Certification Appropriate for You?



SBA HUBZone Responsibilities



HUBZone Eligibility and Requirements



HUBZone Help

For support with government contracting and growing your business visit one of SBA's resource partners (SCORE, SBDCs, WBC, VBOC, and PTAC): <u>https://www.sba.gov/local-assistance</u>

For support with your HUBZone application:

- Visit the HUBZone website: <u>sba.gov/hubzone</u>
- **View** location eligibility: <u>maps.certify.sba.gov/hubzone/maps</u>
- Email our Help Desk with specific questions: <u>hubzone@sba.gov</u>
- Call our HUBZone staff via our weekly conference call Every Thursday at 2pm ET: 202-765-1264; Access code: 63068189#
- Access <u>application FAQs and document requirement checklists</u> by organizational structure

HUBZone Application Process



BEFORE APPLICATION

- View the HUBZone Primer
- Register for a UEI number
- Identify NAICS code(s)
- Register with SAM

APPLY FOR CERTIFICATION

- Review application guide
- Gather supporting documentation
- Apply using the General Login System



DOCUMENTATION

- Verify requested information
- Submit supporting documentation
- Update SAM profile once approved

Supporting Documentation Requirements



HUBZone Site Visits and Re-certification



- Participate in site visits
- Meet HUBZone criteria
- Maintain SBA standards
- Recertify every 3 years

Getting the Most Out of Your HUBZone Certification



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, guaranteed loans and bonding assistance

Where To Go for Help

Contact Information

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U.S. Small Business Administration
HUBZone Map of Washington





15



U.S. Small Business Administration



Women-Owned Small Business Federal Contracting Program (WOSB Federal Contracting Program)

Selling to the Federal Government

- FY 2022 over **\$10.7 Billion*** in federal contracts awarded to firms located in Washington state
- Over \$2 Billion* went to small businesses located in Washington state

Top five federal agencies buying in Washington State (from small businesses)

- Department of Defense (DOD)
- Department of Agriculture (USDA)
- Department of Veterans Affairs (VA)
- Department of Energy (DOE)
- Department of the Interior (DOI)
- Opportunities as a subcontractor to prime contractors

*Figures from USA Spending

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) (13%)

HUBZone Businesses (3%)

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



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





Women-Owned Small Business (WOSB) Certification Eligbility

WOSB Federal Contracting Program







Is the WOSB Certification Appropriate for You?



Managerial experience



51% ownership requirements



Highest officer position



Management of daily operations



Proper NAICS codes



No minimum time in business





Economically Disadvantaged 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





Application Process

WOSB Application Process

- Firm registers in SAM.gov
- Firm registers in beta.certify.sba. gov and claims business
- Firm completes application on beta.certify.sba. gov and uploads appropriate documents for EDWOSB or WOSB

Submission of Application

- SBA receives submission & conducts a "check" of all documents
- If valid, proceeds to next step, notifies firm of a complete application.
- If invalid document(s), screener issues a deficiency letter returning the application or submits request for information (RFI).

Screening

- Reviews eligibility, ownership, and control – 90-day process begins
- Reviews financials for EDWOSB
- May conduct request for information (RFI)
- Submits a final recommendation
 - Analyst Review

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

Director Decision

WOSB READY

Issuing Decisions on Certification



SBA will notify you of a complete, sufficient application package within 15 days.* SBA will make determination within 90 calendar days after a receipt of a complete application, when applicable.

*An SBA representative may reach out if additional information or documentation is required.





beta.certify.SBA.gov

On the **homepage**, you can:

- Updated 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 by submitting the Help form
- Create an account and proceed with your application
- Access the <u>beta.certify.sba.gov</u> <u>knowledge base</u> including training videos, user guides, and more







beta.certify.SBA.gov - Resources

Prepare tab - Updated checklists that provide guidance prior to applying



WOSB **ready**



beta.certify.SBA.gov - Resources

✓ Access the <u>beta.certify.sba.gov knowledge base</u> including training

videos, user guides, and more

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WOSB Application Tips & Tricks

- 1. Ensure you are creating your beta.certify account with the woman owner's login.gov account
- 2. Ensure the woman owner is listed as the Government POC in SAM
- **3. DO NOT** submit multiple help tickets to the help desk
- **4. DO** review the document checklist and resume guidance prior to submitting your application





Contracting

WOSB Local* Prime Contracting-FY 22**

- Prime Contract Dollars in Washington State: \$303 million
- Number of awardees: 387 WOSB prime contractors in Washington State
- Top Industries:
 - Remediation Services (NAICS 562910)
 - Commercial and Institutional Building Construction (NAICS sector 236220)
- Top 5 agencies:

AGENCY	\$ Awarded
Department of Energy	\$131M
Department of Defense	\$97M
Department of the Interior	\$35M
Department of Agriculture	\$15M
General Services Administration	\$6M

*Data based on prime contractors located within Washington State ** figures from USAspending.gov





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.





WOSB and EDWOSB Sole-Source Contracts





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.

WOSB READY



Administration

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

WOSB **ready**



Helpful Websites

- Women-Owned Small Business Federal Contract program (sba.gov)
- <u>eCFR :: 13 CFR Part 127 Subpart B -- Eligibility Requirements To</u>

Qualify as an EDWOSB or WOSB

- <u>SAM.gov</u>
 - Entity Registration Checklist
- WOSB.Certify.sba.gov
 - <u>WOSB.Certify Knowledge Base</u>
 - WOSB Applicant User Guide
 - <u>Application Checklist</u>
 - <u>Application Video Tutorials</u>
 - FAQs for WOSBs/EDWOSBs (sba.gov)







There are several resources available to help answer questions about the WOSB Federal Contracting Program.

- Women's Business Centers
 - <u>Seattle</u>
 - <u>Lacey</u>
 - <u>Spokane</u>
- **Procurement Technical Assistance Centers (new name: APEX Accelerator)**
- Small Business Development Centers
- <u>SCORE</u>
- WOSB Program Office
 - wosb@sba.gov





Ques?



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Veteran Small Business Certification Program (VetCert)

sba.gov/vetcert

veterans.certify.sba.gov

From the Administrator

- Goal: Increase the VOSB and SDVOSB industrial base
- Objectives:
 - Simplify the preparation and submission of certification documentation and data
 - Streamline the certification review process without compromising due diligence
 - Shift resources and funding from certification activities to training and growth activities
- The program is a top priority for SBA Administrator Isabella Casillas Guzman to ensure that veteran and service-disabled veteran business owners receive their certification and have access to the federal marketplace.

VOSB = Veteran-Owned Small Business SDVOSB = Service-Disabled Veteran-Owned Small Business

Veteran Small Business Certification Program

- The National Defense Authorization Act of 2021 officially requires VA's CVE responsibilities to be transferred to the SBA as of **Jan 1, 2023**, and for the SBA to establish a government-wide certification program.
- The SBA program name for certifying VOSBs and SDVOSBs is the **Veteran Small Business Certification Program, or VetCert.**
- The final rule for the program was published on November 29, 2022, in the <u>Federal Register</u>.
- The program launched to the public and began accepting new applications on January 9, 2023.

-<u>Veterans.certify.sba.gov</u>

Highlights of the New SBA Certification Program

- Along with the transfer to the SBA, there are changes to both the process and system to receive certification and make it easier for owners to have someone assist them in preparing their application.
- After the grace period expires for SDVOSBs, all VOSBs and SDVOSBs will be expected to be certified by the SBA to receive sole source or set aside awards from federal agencies.
- Agencies will continue to receive SDVOSB goaling credit for awards made to selfcertified SDVOSB on non-SDVOSB set aside or sole source contracts. The SBA intends to reevaluate self-certification for goaling purposes once this program is launched.
- The SBA VetCert program provides reciprocal certification for businesses with remaining eligibility in the WOSB and 8a programs.
- Business-friendly approach to ownership requirements that aligns veteran certifications with the 8a and WOSB programs.
- Joint ventures do not require certification although the managing partner must be SBA certified and the joint venture must request designation.

Policy Highlights – Key Changes

- SDVOSBs need to be certified by the SBA to receive sole-source or set aside contracts from any federal agency
 - SDVOSB government-wide goal is still 3%
 - Agencies can still rely on self-certification for goaling purposes
- VOSBs continue to need to be certified for sole-source and set aside contracts from the VA under its Vets First Authority
 - Other federal agencies do not have a mandate or authority to award contracts to VOSBs
- The SBA has both the certification system (for small businesses to apply/reapply) and the search tool (for the public & acquisition professionals)
 - SAM.gov will not accurately reflect SDVOSB/VOSB certification status
- WOSB and 8(a) firms will have their certifications recognized if the qualifying individual(s) are the same across programs

Policy Highlights – Key Changes (cont.)

- **One Year Extension** Companies that were verified by the VA Center for Verification and Evaluation (VA CVE) prior to January 1, 2023, have automatically received a 1-year extension to their program term (4 years vs. 3 years)
- **One Year Grace Period** Companies may self-certify through 2023, but must also submit an application to SBA for a final determination
- **Certification will not be for a specific NAICS code** SBA's certification process determines that a business is currently small in at least one NAICS code listed in the firm's SAM.gov profile. To avoid restricting a certified VOSB/SDVOSB's ability to expand its operations into new industries, a firm must only qualify under the size standard corresponding to the NAICS code assigned to a specific contract.
- **Final Rule** takes steps to harmonize & simplify definitions of ownership, control, day to day operations, and standard hours across certification programs
- OHA handles appeals & protests
- Surplus Property Program is opened to VOSB & SDVOSB businesses

Benefits of SBA Certification

- The SBA provides small businesses the opportunity to access resources such as training, business counseling, access to capital, and more.
- Most resources such as counseling, training, classes, financial readiness assessments, etc., are offered at little to no cost to all small businesses.
- Certification allows firms the opportunity to compete in the federal marketplace and for sole-source and set-aside contracts. Self-certified firms do not qualify for VA contracting opportunities.

Eligibility

To apply for certification as a VOSB or SDVOSB, a firm must meet the following requirements:

- Owners identified by Veteran Affairs as a veteran and or service-disabled veteran
- Be considered a small business as defined by the size standard corresponding to any NAICS code listed in the business's SAM profile (SAM registration required).
- No less than 51 percent of the business owned and controlled by one or more veterans.
- For certification as a SDVOSB, no less than 51 percent owned and controlled by one or more service-disabled veterans. For those veterans who are permanently and totally disabled and unable to manage the daily business operations, the spouse or permanent caregiver qualifies.



One-Year Certification Extension

For businesses currently verified by the VA:

- Administrator Isabella Casillas Guzman has granted a one-time, oneyear extension to current VOSBs and SDVOSBs verified by the VA.
- The extension allows the SBA to process applications from new entrants into the program and grow the base of certified firms.
- The additional year is added to the existing eligibility period of a current participant.

For new applicants:

• New applicants certified by the SBA after January 1, 2023, will receive the standard three-year certification period.

Grace Period for Self-Certified Businesses

The 2021 National Defense Authorization Act (NDAA) of 2021 grants a <u>one-year</u> grace period for self-certified SDVOSBs until January 1, 2024.

- During the grace period, self-certified businesses have one year to file an application for SDVOSB certification and may continue to rely on their selfcertification to compete for non-VA SDVOSB set-aside contracts.
- Self-certified SDVOSBs that apply before the expiration of the one-year grace period will maintain eligibility until the SBA makes a final eligibility decision.

Transfer of VA Verified Businesses to SBA

- The transfer of VA verification to the SBA requires nothing from the business owner.
- The SBA is accepting all businesses verified by the VA as SBA-certified.
- All documents and data were transferred via data transfer so that those documents reside in the new SBA system.
- Business owners should verify that the email address used to register a VetCert account is the <u>same</u> email address used in their prior CVE verification. If it is different, contact VetCert Customer Service, 1-800-862-8088.



What Does This Mean for VOSBs and SDVOSBs?

If you are a VOSB or SDVOSB that is VA CVE verified as of the January 1, 2023, transfer date:

- The SBA has granted a one-time, one-year certification extension as of the transfer date for firms verified by the VA prior to January 1, 2023.
- The one-year extension is reflected in the SBA Veteran Small Business search tool.
- If the business applies for and receives recertification during the extension period, their new three-year certification begins from the date of expiration.
- For all verified businesses, as your verification expiration date approaches, you can apply for re-certification through the SBA's new certification program.

Recertification for all VOSBs or SDVOSBs with a currently active certification will not be an option until a later date in 2023.

• The one-year certification extension serves to mitigate the need for recertification until the option becomes available in the new SBA application program. The SBA will actively communicate when the recertification option becomes available.

Does the Transfer Affect VA's "Veterans First" Authority?

- There is no effect on VA's Veterans First contracting authority. VA will continue to implement this policy utilizing the SBA's certification program and database for verification purposes as of January 1, 2023.
- There is no government-wide VOSB program, but the VA will retain its unique authority to award set asides and sole source VA contracts to VOSBs.
- VA's database of verified firms will also transfer to the SBA, who will own and maintain the database. VA contracting officers will use the SBA's database to confirm a firm's eligibility when awarding VA SDVOSB or VOSB set aside and sole source contracts.
- For all other agencies, SDVOSBs will need to be certified by the SBA to be eligible for set aside and sole source awards.

How Does a Business Prepare for Application?

Step 1: Determine eligibility.



- The business owner must be a veteran or a service-disabled veteran as established in Title <u>38 CFR Part 74</u> or <u>13 CFR Part 128</u>.
- Be considered a small business as defined by the size standard corresponding to at least one NAICS code listed in the business's SAM.gov profile.
- No less than 51 percent of the business must be owned and controlled by one or more veterans.
- For certification as a SDVOSB, no less than 51 percent of the business must be owned and controlled by one or more veterans rated as service-disabled by VA.
- For those veterans who are permanently and totally disabled and unable to manage the daily business operations of their business, their business may still qualify for certification as an SDVOSB if their spouse or appointed permanent caregiver is assisting in that management.

Step 2: Ensure registration in SAM.gov. The business MUST be registered in SAM.gov to move forward.

Step 3: Gather required documentation before beginning the application. A <u>fact sheet</u> listing required documentation is available at <u>sba.gov/vetcert</u>.

SBA Certification Process Flow



- Less documentation required then previous process
- ✓ New software easy to navigate
- ✓ Allows for reciprocal qualification with other SBA qualifying set aside programs.

process as needed
All Analysts submit recommendation to approve, deny, or

remove application

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SBA's Veteran Small Business Certification Program

Landing Page to Login or Register a New Account Veterans.certify.sba.gov



U.S. Small Business Administration

Veteran Small Business Certification (VetCert)

Veteran-owned small businesses can use this application to be certified by SBA to compete for federal contracts. Certified veteran-owned small businesses (VOSBs) will have the opportunity to pursue sole-source and set-aside contracts at the Department of Veterans Affairs under the VA's Vets First program. Certified service-disabled veteran-owned small businesses (SDVOSBs) will have the opportunity to compete for federal sole-source and set-aside contracts across the federal government.

Register Sign In

Search for a Certified Veteran Small Business

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Is the Veteran Small Business Certification Program Related to the SBA's MySBA Initiative?

The MySBA initiative is under development.

What is the vision for MySBA?

- Establishes a centralized/collaborative structure to understand, improve, and unite the customer experience across all SBA programs.
- Intended to provide a single point of access for SBA loans, certifications, counseling, trainings, etc.
- Customer experience is intended to be more customer-centric and easy to use.
- Streamlined processes will align data and customer engagement, reduce redundancies, etc.

Once MySBA is launched, the Veteran Small Business Certification Program will fall under its umbrella.

For More Information

- Visit SBA's website: <u>www.sba.gov/vetcert</u>
- Email <u>vetcert@sba.gov</u>
- Contact the dedicated toll-free call center: 800-862-8088
 - Monday -Friday, 8 a.m. 6 p.m. ET
 - Excludes federal holidays
- Visit the Frequently Asked Questions on the VetCert platform
 - Veterans.certify.sba.gov

Additional Support and Resources



Veterans Business Outreach Center (VBOC)



https://washingtonptac.org



www.sba.gov/veteran