SBA

U.S. Small Business Administration



SBA's Learning Series

The Women-Owned Small Business Program

Not intended for public distribution

Hosts

Darryl Williams, Procurement Center Representative SBA Office of Government Contracting, Area IV, Warren, MI

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Welcome to "SBA Virtual Learning 2024"

- 1. Questions answered during the final 10 minutes.
- 2. Technical problems: Contact your IT admin who manages Teams settings for your organization.
- 3. Captioning available for this presentation.
- 4. We cover the "SBA Quick Reference" as time allows.
- 5. For more SBA training visit the SBA Learning Center website https://www.sba.gov/tools/sba-learning-center/search/training



Important Announcements

May 1, 2024, First Wednesday

- SBA Learning Series Schedule Revisions
- SBA Learning Series Session 8, scheduled for May 1, 2024, is tentatively revised to Thursday, May 9, 2024, due to a competing scheduled event.

July 3, 2024, First Wednesday

- The July 3 session of First Wednesday is moved to Thursday, July 11, 2024
- This is due to First Wednesday proximity to July 4, 2024 (The Fourth of July Holiday)



The APEX Accelerator Program

The APEX Accelerators are a vital resource partner.

- The APEX Accelerators posts past "First Wednesday" programing at this link: http://www.aptac-us.org/for-contracting-officers-sba-webinar-library/
- Contracting Officer Resources: "How APEX Accelerators partner with federal agencies": http://www.aptac-us.org/federal-partners/
- Find your nearest APEX Accelerators/Procurement
 Technical Assistance Center at http://www.aptac-us.org
- APEX Accelerator Information at https://www.apexaccelerators.us/#/



Small Business Administration YouTube Page

SBA YouTube page posts past "First Wednesday" programming at links below.

FY2023

- October 5, 2022 8(a) Business Development Program Updates: https://youtu.be/Yl5Sp0dP1aE
- November 2, 2022 Surety Bond Guarantee Program: https://youtu.be/QIZJiMLcc5o
- December 7, 2022 Subcontracting Program: https://youtu.be/gMaaeGl8CBs
- January 4, 2023 Surveillance Review Program: https://youtu.be/euUX4Jv6kRl
- February 1, 2023 HUBZone Program: https://youtu.be/YGnS8e6idCc
- March 1, 2023 The Mentor Protégé Program: https://youtu.be/A9KbCm4FP1c
- April 5, 2023 Non-Manufacture Rule (NMR): https://youtu.be/AqwYMWoe9f0
- May 3, 2023 Size Program: https://youtu.be/45WZ oPb1GY
- Jun 7, 2023 Legislature and Regulatory Updates: https://youtu.be/ljx9lajQJNY
- July 5, 2023 Market Research: <u>SBA First Wednesday Market Research July 13, 2023</u>
- August 2, 2023 Service-Disabled Veteran Owned Program (SDVOSB): https://youtu.be/QxcxJISRhnw

FY2024

- October 4, 2023 Certificate Of Competency: https://youtu.be/VDZ-uuCLlWw
- November 1, 2023 8(a) Program Updates: https://youtu.be/6fN3dK0EShs
- December 6, 2023: https://youtu.be/sa29iONBtfk
- January 3, 2024 Compliance Reviews: https://youtu.be/WmZn_oa13-o
- February 7, 2024 Limitations on Subcontracting: https://youtu.be/fytGi6zhjXM
- March 6, 2024 Mentor Protégé Program: https://youtu.be/ULmCzTe4c04



FIRST WEDNESDAY VIRTUAL LEARNING SERIES FY 2024 SCHEDULE

1.00 to 2.00 DM Central Time

FY 2024	Date	Topic
1	October 4, 2023	COC
2	November 1, 2023	8(a) Program Updates
3	December 6, 2023	The Timber Program and SBA POCs
4	January 3, 2024	Compliance Reviews
5	February 7, 2024	Limitations on Subcontracting
6	March 6, 2024	SBA Mentor Protégé Program and Joint Ventures
7	April 3, 2024	Women Owned Small Business (WOSB)
8	★ May 9, 2024	Participation Plans versus Subcontracting Plans
9	June 5, 2024	Legislative Updates
10	*July 11, 2024	HUBZone
11	August 7, 2024	Market Research

^{*} Schedule Revision Due to Holiday or Programming Conflict
The program schedule is for information only and is subject to change.



One Continuous Learning Point

- Self-service process for one CLP of credit: Many of you want to receive credit for today's training. You will be glad to know that today's training is worth one CLP. The slide presentation will include the training certificate on Slide 10. Fill, download the training certificate, copy and submit it through regular channels.
- If you listen in groups and you want all attendees to be included on the future mailing list, send email addresses of participants in an excel document to sbalearning@sba.gov.

"SBA 1st Wednesday Virtual Learning 2024"

This Certificate is awarded to

Insert Your Name Here

For completion of

The Women-Owned Small Business Program

This training seminar may be credited towards "Continuous Learning Points" as described in OFPP Policy Letter 05-01. Recommendation of One CLP.

Pamela J. Beavers

Director, Area IV

SBA Office of Government Contracting

04/03/2024

DATE



Today's Speakers

Alisa Sheard
WOSB Federal Contract Program Director
Deputy Director, Office of Government Contracting

Terrence Moultrie Sr.
Terrence.MoultrieSr@sba.gov
Business Opportunity Specialist

Zachary Gieber zachary.gieber@sba.gov Management Analyst





Women-Owned Small Business Federal Contract Program

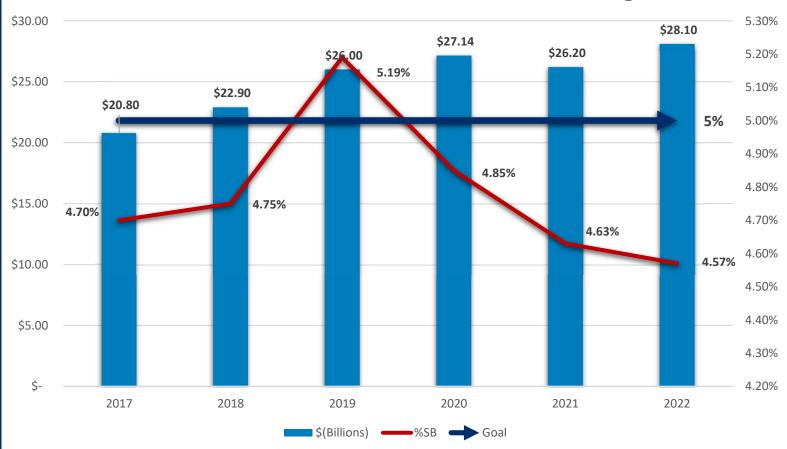
Alisa Sheard

WOSB Federal Contract Program Director

Federal Scorecard Performance

5% GOAL

Women-Owned Small Business Prime Contracting







WOSB Goal Achievement - FY2022

5% Goal: Met (16)		
SBA (19.82%)	USDA (10.02%)	
Commerce (13.91%)	NRC (12.40%)	
Interior (13.76%)	DHS (7.81%)	
Labor (8.81%)	GSA (9.91%)	
OPM (38.66%)	USAID (6.57%)	
HUD (15.31%)	NSF (8.57%)	
Treasury (7.19%)	DOT (7.92 %)	

Justice (6.63%) Education (5.27%)	Justice (6.63%)	Education (5.27%)
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5% Goal: Not Yet (8)				
Defense (3.91%)	NASA (4.35%)			
Veterans (1.85%)	Energy (4.31%)			
State (3.95%)	SSA (3.16%)			
EPA (4.10%)	HHS (4.75%)			

BOLD = Big 7

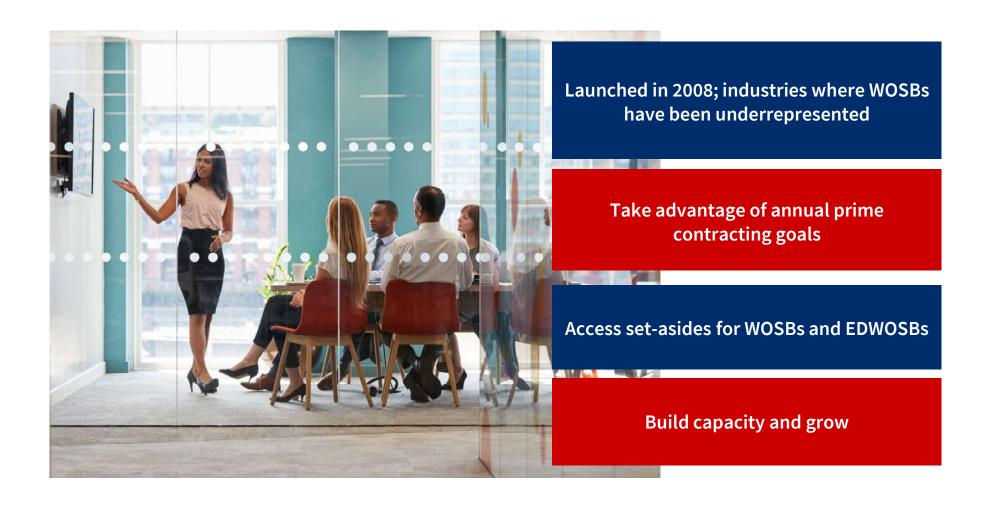
GREEN = Improved from FY21



WOSB Federal Contract Program

#EquityinProcurement

WOSB Federal Contract Program





Unique Aspects of the WOSB Federal Contract Program



Many NAICS codes are now authorized for use under the WOSB Federal Contract Program. Check sba.gov/wosbready for available NAICS (733).



WOSBs and EDWOSB must receive certification through WOSB.certify.sba.gov in order to be eligible to compete on set-aside and sole-source contracts.



COs must verify WOSB and EDWOSB certification on the <u>Dynamic Small Business Search</u> (DSBS) database.

WOSB READY

Certification Changes

- The final rule was published in the <u>Federal Register</u> on May 11, 2020. This final rule fully details changes to the certification process and went into effect on October 15, 2020.
- Once the changes went into effect:
 - All WOSBs seeking to participate in the WOSB Federal Contract Program must 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) or VA CVE/SBA VetCert certified firms.
 - Women-owned small businesses that are not certified for SBA's WOSB Federal Contracting Program may continue to identify as women-owned small businesses in SAM.gov and receive contract awards outside the program, and these awards can count toward an agency's goal for awards to WOSBs.

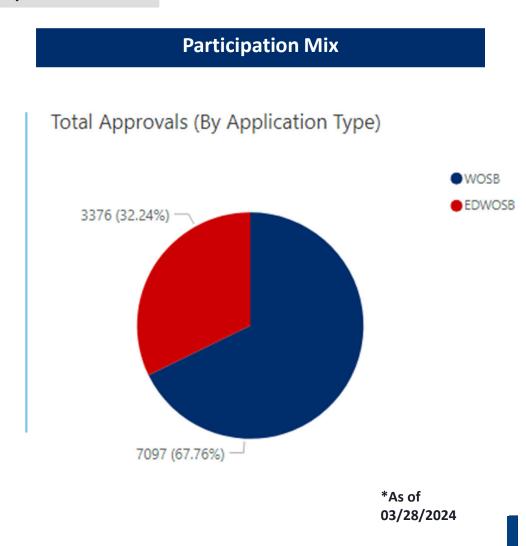


WOSB Federal Contract Program Participants

Total Program Participants

10,477

Top NAICS		
541611	Administrative Management and General Management Consulting Services	
541511	Custom Computer Programming Services	
541330	Engineering	
541512	Computer Systems Design Services	
611430	Professional and Management Development Training	
236220	Commercial and Institutional Building Construction	
541519	Other Computer Related Services	





Third-Party Certifiers

- SBA allows continued participation from businesses that utilize approved Third-Party Certifiers (TPCs) to obtain WOSB or EDWOSB certification.
- Approved TPCs:
 - <u>El Paso Hispanic Chamber of Commerce</u>
 - National Women Business Owners Corporation
 - U.S. Women's Chamber of Commerce
 - Women's Business Enterprise National Council

WOSB Program

#DidYouKnow



Good News Stories

- Following training and support by the WOSB Program in March 2023, DHS reported awarding a \$40.9M WOSB set-aside contract for armed protective security services at 7 facilities
- DHS (National Capital Region) reported within a 7-month period awarding \$183M under 4 WOSB set-asides for protective security services in the DC metro area
- Dept of Education creating a WOSB set-aside Digital Services IDIQ, CANDACE – named after Candace Waterman, former CEO for Women Impacting Public Policy (WIPP)
- Fueling US Economic Impact: In FY21, over \$1.2 billion in federal procurements were set-aside for WOSB/EDWOSB firms generated 2.8x the impact for a total of over \$3.6 billion in aggregate economic activity—WOSB firms have the biggest impact to our US marketplace more than any of the other SBA set-aside programs.



Professional Service/IT Services is #1 NAICS/Industry Currently 80% of the NAICS/industries qualify for the WOSB Program

Key Facts

23% of WOSBs hold multiple certifications

65% of WOSB Program participants are SDB





5

More than 60% of SDB dollars are awarded to non-8a firms

6

WOSB contracts are highest economic multiplier among the socio-economic programs

Key Facts

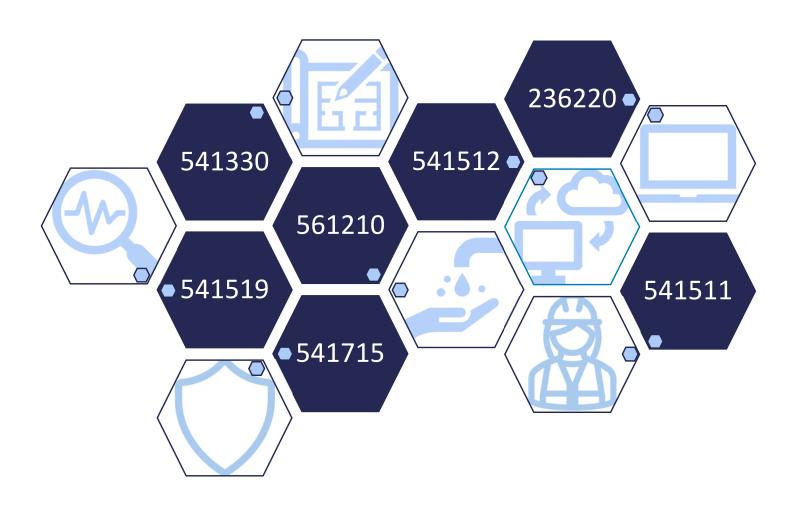
Over 10,000 certified WOSB/EDWOSB firms

8

Spending with WOSBs has increased since the certification rule took effect



Industries of Opportunities





How can we help?

- Support for Market Research
- Guidance on sole sourcing
- Amplifying federal agency WOSB efforts
- Training acquisition teams to increase technical proficiency
- Improving application processing timeline to prevent acquisition delays



WOSB Stakeholder Groups

- Approved TPCs:
 - El Paso Hispanic Chamber of Commerce
 - National Women Business Owners Corporation
 - U.S. Women's Chamber of Commerce
 - Women's Business Enterprise National Council
- Women Stakeholder Groups
 - Women Impacting Public Policy (WIPP)
 - National Women's Business Council
 - Black. Owners. Women. (BOW) Collective
 - Women's Procurement Circle
 - Women Veteran Small Business Coalition
 - <u>Digital Women Alliance</u>
 - MogulCon

*This list is not exhaustive

- National Association of Women Business Owners
- Women Construction Owners and Executives
- Association of Women's Business Centers
- Federation of Women Contractors





Agency Call to Action

- Tell us about your WINS!
- 2. Participate in ChallengeHER matchmaking
- 3. Engaging with new affinity groups
- 4. Make awards to firms who hold multiple certifications.
- 5. Build relationships with new WOSB and EDWOSB businesses.
- 6. Plan in advance to reserve opportunities for WOSB/EDWOSB set-asides in key NAICS/industries.
- 7. Commit to making at least one more WOSB/EDWOSB award than you did last year.



Contracting #AwardingWOSBContracts



Myth Busting

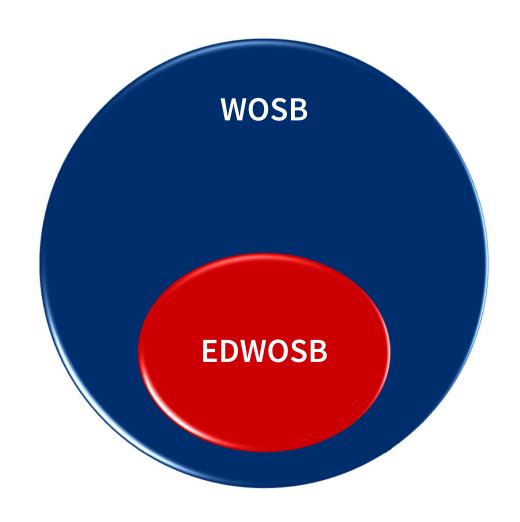
- "Sole-source is confusing."
- "Most WOSBs only do administrative services."
- "I can't find WOSBs that sell what we buy."
- "The pool of participants is not large enough."
- "Not enough capable WOSB firms to meet our special requirements"
- "Seems too complicated to verify eligibility."



WOSBs and EDWOSBs

- 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 and EDWOSB Question



May an EDWOSB submit an offer on a set-aside for WOSBs?

How to Find a WOSB/EDWOSB Firm

- Search DSBS to find and verify WOSB or EDWOSB -certified businesses.
- Get personal assistance from the SBA's government contracting area offices or from Procurement Technical Assistance Centers.
- Contact your agency's Office of Small and Disadvantaged Business Utilization (OSDBU) or your Agency Small Business Specialist.
- Issue a sources sought announcement in the System for Awards Management (SAM) seeking interested WOSB/EDWOSB small businesses.



WOSB and EDWOSB Set-Aside Contracts - Competitive

Industries **Award Price** Rule of Two

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

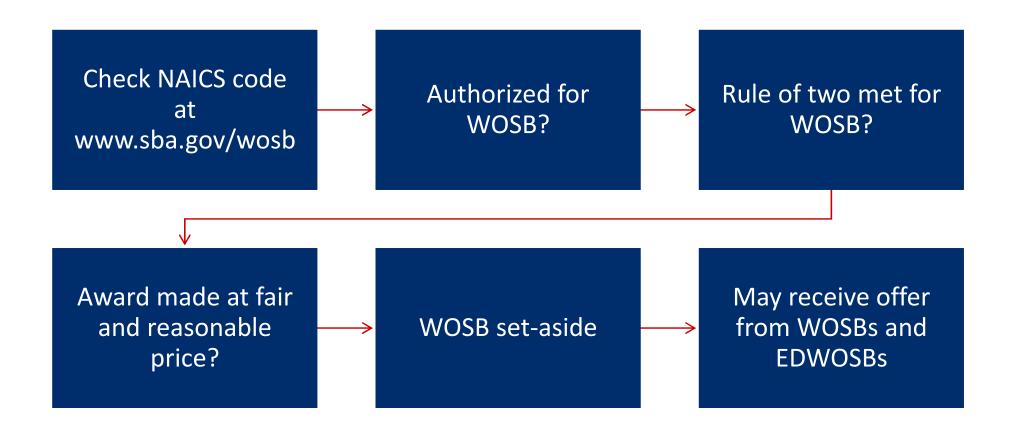
Award Price

Contract must be awarded at fair market price WOSB READY



WOSB Set-Aside

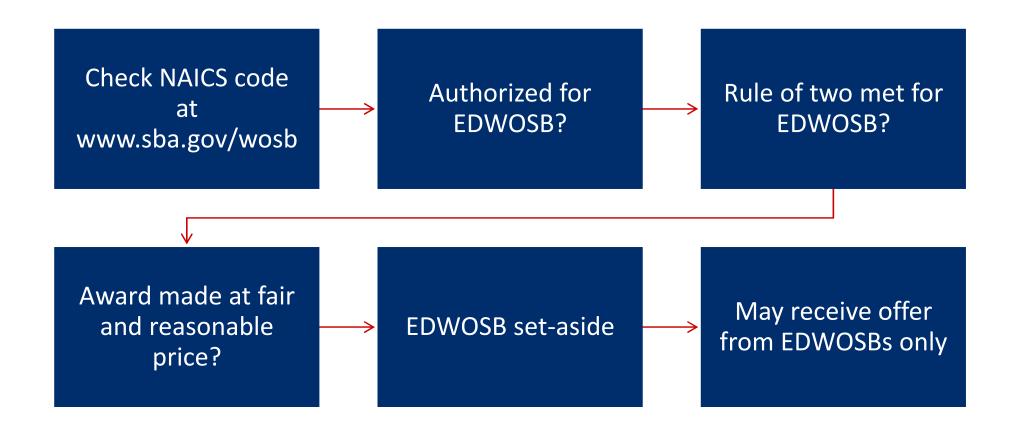
Decision Making Process





EDWOSB Set-Aside

Decision Making Process





Important WOSB Considerations

Suggested language to include in a WOSB/EDWOSB solicitation:

"Pursuant to FAR 19.1503(a), offerors must be sure their WOSB or EDWOSB status is in accordance with 13 CFR Part 127.

If the apparent successful offeror has submitted a complete application that is pending certification at the time of initial offer, or certified, by the U.S. Small Business Administration (SBA), the offeror will be eligible for proposal or bid submission, per 13 CFR 127.504. Offerors that need assistance in submitting a complete application to WOSB.Certify.sba.gov are advised to contact the SBA Office of Government Contracting at wosb@sba.gov."



WOSB and EDWOSB Question



If the NAICS code is authorized for WOSBs, can the CO set the procurement aside for EDWOSBs?



WOSB and EDWOSB Sole-Source Contracts

Industries Only Source **Award Price**

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**

Sole Source

Contracting officer has reasonable expectation that only 1 WOSB/EDWOSB that can perform written J&A (FAR 6.302-5)

Award Price

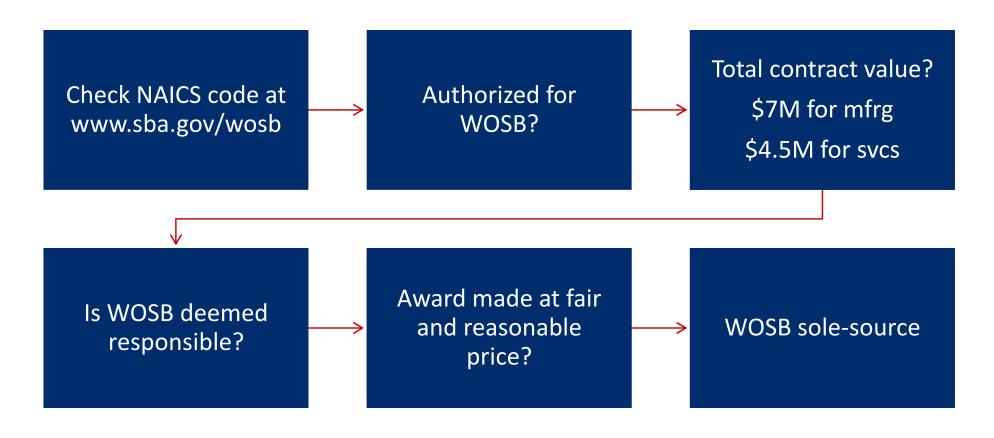
Contract must be awarded at fair market price (\$7M for manufacturing or \$4.5M for all others)

WOSB READY



WOSB Sole-Source

Decision Making Process



WOSB Federal Contracting Program is <u>NOT</u> a business development program. As such, there is no statutory authority to make a direct award. Agencies are required to prepare and approve J&A. FAR 6.302-5(c)(2).



EDWOSB Sole-Source

Decision Making Process



WOSB Federal Contracting Program is <u>NOT</u> a business development program. As such, there is no statutory authority to make a direct award. Agencies are required to prepare and approve J&A. FAR 6.302-5(c)(2).



Sole-Source Under WOSB Federal Contract Program

FAR 6.302-5(b)(7)

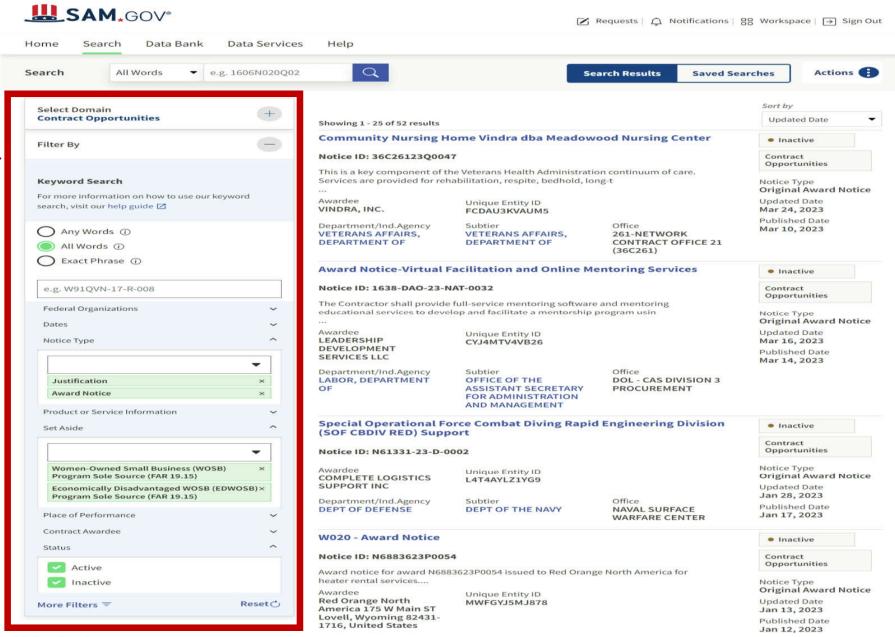
 Establishes solesource authority under the WOSB Federal Contract Program.

FAR 6.302-5(c)(2)

Provides
 contracts
 awarded using
 this authority
 shall be
 supported by
 written J&As.



Searching for Sample Sole Source J & A





Set-Aside or Sole-Source Examples



I have a requirement calling for the contractor to provide sign language interpretation services. NAICS Code 541930– Translation and Interpretation Services—is assigned to the solicitation. Market research results indicate that the rule of two can be met for WOSB set-asides. I have advertised it as a WOSB set-aside. Can I do a WOSB set-aside?

5419		Other Professional, Scientific, and Technical Services	
	541910	Marketing Research and Public Opinion Polling	WOSB
	541921	Photography Studios, Portrait	WOSB
	541922	Commercial Photography	WOSB
	541930	Translation and Interpretation Services	WOSB
	541940	Veterinary Services	WOSB
	541990	All Other Professional, Scientific, and Technical Services	WOSB



Set-Aside or Sole-Source Examples



Our agency has a solicitation calling for the contractor to provide staffing services. NAICS Code 561320–Temporary Help Services—was assigned to the procurement. Market research results indicate that the rule of two will be met for WOSB and SDVO SBC setasides. Can I do a set-aside for WOSB?

5611	561110 Office Administrative Services	EDWOSB
5612	561210 Facilities Support Services	WOSB
5614	561410 Document Preparation Services	EDWOSB
	561421 Telephone Answering Services	EDWOSB
	561422 Telemarketing Bureaus and Other Contact Centers	EDWOSB
	561431 Private Mail Centers	EDWOSB



Set-Aside or Sole-Source Examples



I have an RFQ to purchase computer network equipment. NAICS Code 541519–Other Computer Related Services–is assigned to the procurement. Market research results indicate that the rule of two can be met for EDWOSB and WOSB set-asides. Which one do I select?

	541490 Other Specialized Design Services	EDWOSB
5415	541511 Custom Computer Programming Services	WOSB
	541512 Computer Systems Design Services	WOSB
	541513 Computer Facilities Management Services	WOSB
	541519 Other Computer Related Services	WOSB
5416	541611 Administrative Management and General Management Consulting Services	WOSB
	541612 Human Resources Consulting Services	WOSB



Dynamic Small Business Search

Pending WOSB

SBA Profile	Skip Navigation > Accessibility Options > Mobile View Exit Back To Profile List		
HUBZone Certified?: HUBZone Certification Date:	[] Yes [X] No		
8(a) Joint Venture Certif	ication:		
8(a) JV Entrance Date: 8(a) JV Exit Date:			
Women Owned - SBA Cel	rtified:		
WOSB Certified?: [] Yes [X] No WOSB Pending?: [X] Yes [] No WOSB Pending as of 05/04/2022			
Economically Disadvanta	ged Women Owned - SBA Certified:		
EDWOSB Certified?: EDWOSB Pending?:	[] Yes [X] No [] Yes [X] No		

SBA's <u>Dynamic Small Business Search</u> is now live on the cloud, improving the system's speed and availability. Please go to dsbs.sba.gov to access the improved DSBS. Make sure to change any bookmarks you have to the previous website.

Certified WOSB

Skin Na	avigation > Accessibility Options >
Mobile	e View Exit To Profile List
HUBZone Certified?: HUBZone Certification Date:	[] Yes [X] No
(a) Joint Venture Certification:	
8(a) JV Entrance Date: 8(a) JV Exit Date:	
Vomen Owned - SBA Certified:	
WOSB Certified?: WOSB Certification Date: WOSB Pending?:	[X] Yes [] No 10/15/2020 [] Yes [X] No
conomically Disadvantaged Wo	omen Owned - SBA Certified:
EDWOSB Certified?: EDWOSB Pending?:	[] Yes [X] No [] Yes [X] No



Joint Ventures

A WOSB/EDWOSB may submit an offer as a joint venture with another small business if the requirements of 13 CFR 127.506 are met.

Note: JV agreement must be submitted to CO. SBA does <u>not</u> approve JV agreement but will process any status protests!

Eligibility Examinations & Protests

SBA is committed to ensuring only eligible WOSBs benefit from the WOSB Federal Contract Program. FAR guidance for protests for SBA Programs: FAR 19.3

Any WOSB/EDWOSB found to be ineligible will be decertified in DSBS; CO **shall not award** the contract.





Changes to Remember

- The self-certification process is no longer available in <u>certify.sba.gov.</u> All Firms seeking to participate in the program must apply via WOSB.Certify.sba.gov
- Third-party certified firms MUST submit their TPC certificate to WOSB.Certify.sba.gov for SBA to display their WOSB certification.
- All firms seeking to participate in the WOSB Federal Contract Program, WOSB or EDWOSB set-aside contract or sole source must be certified.
- Verification of a firm's WOSB Certification can be viewed on the firm's <u>Dynamic Small Business Search</u> (DSBS) profile under Federal Certifications section.

Resources

SBA Website Resources:

- For small businesses: <u>www.sba.gov/wosbready</u>
- For program administration and COs:
 https://www.sba.gov/partners/contracting-
 https://www.sba.gov/partners/contracting-
 https://originals.contracting-program-administration/wosb-program-administration
 https://originals.contracting-program-administration/wosb-program-administration
 https://originals.contracting-program-administration/wosb-program-administration
 <a href="https://originals.contracting-program-administration/wosb-program-administration/w
- Eligible Industries List: <u>Eligible NAICS for the Women-Owned Small Business Federal Contracting program U.S. Small Business Administration (sba.gov)</u>

Regulatory Resources

- <u>U.S. Code 8(m) Small Business Act WOSB Program Statue</u>
- SBA's Code of Federal Regulations WOSB Federal Contract Program:
 - 13 CFR 127 Subpart E Federal Contracting Assistance
 - 13 CFR 127 Subpart F Protests
- FAR 19 Small Business Programs
- FAR 19.15 WOSB Program
- FAR 6.302-5 Authorized or required by statute
- SBA Size Standards Regulations
- 13 CFR 125.6 Limitations on Subcontracting

THANK YOU!

Questions and Answers



WOSB READY