

**Candice:** Welcome and thank you for joining today's live SBA web conference. Before we begin, please ensure you're in the WebEx event and have opened the chat panel by using the associated icon located at the bottom of your screen. You are welcome to submit written questions during the presentation and these will be addressed during Q&A. To submit a question, select all panelists from the dropdown menu in the chat panel, enter your question in the message box provided, and press enter to send. Note that all audio connections are muted at this time. If you require technical assistance, please send a chat to the event producer. With that, I'll turn the conference over to Chris Ishan. Chris, please go ahead.

**Chris:** Thank you, Candice. Hello everyone and welcome to the ninth session of SBA's first Wednesday webinar series for fiscal year 2020. We want to remind you that with an email invitation for today's session, we also included some SBA guidance and resources regarding Covid-19, so please check that out. The additional information can also be found at [www.SBA.gov/coronavirus](http://www.SBA.gov/coronavirus).

Onto slide two. For today's session, we'll be focusing on the Women-Owned Small Business Program and by the end of the program, you should have a better understanding of this topic as well as the resources available to you.

If you are new to our event, this is a webinar series that focuses on getting subject matter experts on specific small business topics such as the women-owned small business program and having them provide you with valuable information you can use in the performance of your job. We appreciate you taking the time to participate in the FY 20 program, and we hope that you benefit from today's session.

Onto slide three. As Candice mentioned, I'm Chris Ishan, and I work as a procurement center representative or PCR, and I'm located in Kansas City, Missouri. Additionally, Mr. Charles Mason, who is the PCR in Omaha, Nebraska, will be reading your questions submitted during the program for our speaker to address at the end of today's session. We both work in government contracting area four and slide three includes our information.

Onto slide four. Please note that all lines are on mute; however, you may submit questions or technical issues in the chat box on your screen. Your questions may be submitted anytime during today's session by entering them into the chat box and these questions will be addressed at the end of our speaker's presentation. To make sure your question doesn't get overlooked, please ensure it is

addressed to all panelists on the dropdown menu and not just one individual.

As most of you know, we have transitioned to WebEx and have been informed that some users may experience issues such as a blocked website or other error messages when attempting to access the conference login from their computer. If you're affected by this issue, please make sure you dial in and follow along with the slides provided in the email. We will ensure the page numbers are clearly stated, so you can follow along.

Now, if you are having any other technical issues, call the AT&T support desk at the following number that is 301-250-7202. This telephone number is also included in the email invitation for today's program and on slide four of the PowerPoint presentation.

For more SBA small business program training and additional resources, please visit the SBA learning center at [www.SBA.gov](http://www.SBA.gov).

Onto slide five, did you know that the Association of Procurement Technical Assistance Centers, or APTAC, host a website where they post the first Wednesday programs. Since these sessions are being recorded, you can re-listen to this program as well as previous sessions by visiting their website which is provided here on slide five.

Additionally, procurement technical assistance centers, or PTACs, are a great resource and partnering with your local PTAC for an industry day, sharing RFI notices, or sources **[0:03:56 inaudible]** announcement, or simply referring small business concerns to a PTAC are just a few reasons why they are such a useful resource for acquisition personnel. Please contact your local PTAC for additional information.

Onto slide six. Slide six is the program schedule for fiscal year 2020 and today's session on the women-owned small business program is the ninth topic in the series for this fiscal year. You will see that we have had to adjust the schedule slightly due to speaker availability and we will have two more training sessions offered this fiscal year.

Onto slide seven. I'm sure many of you will want to receive credit for today's training, so you'll be glad to know that today's session is worth one CLP. On the following slide, which is slide eight, you will find the training certificate and I will go over the instructions at that time.

Now, several of you may have received this information for the training from a friend or colleague, but if you want to receive an

email directly from us, notifying you of upcoming first Wednesday webinar events, just email us at sbalearning, S-B-A-L-E-A-R-N-I-N-G, @SBA.gov. In the subject line, please enter the words "add to list" and we'll ensure you're added to the distribution list.

On slide eight, you will see the certificate. First, you'll need to access the PowerPoint presentation that was emailed to you. Then you will manually fill in your name where it states, "Insert your name here." Next, within the print setting, you will want to set, "Select print current slide," which will allow for only the certificate to be printed. Once this is done, you can coordinate the CLP achievement through your training program, and another reminder, SBA does not track your CLP achievements or communicate with your training program regarding your CLP achievements.

Onto slide nine. Today's training has been assembled to educate you on the women-owned small business program as well as provide you with additional SBA resources available for your use. Our speaker has graciously accepted our invitation and she will be directing me to continue on to the next slide.

As mentioned earlier, if you're unable to access WebEx, please follow along with the PowerPoint presentation that was included in the email for today's training. We will identify the page number, so you can follow along.

Also, please note that some viewers may experience a delay as the slide changes on your screen.

Now, I am pleased to introduce today's speaker to you, Ms. Alisa Sheard, who is the team lead for SBA's women-owned small business federal contracting program. We appreciate that you can meet with us today, Alisa, and I'll turn the program over to you now.

**Alisa:**

Awesome. Thank you so much, Chris. I really appreciate you having me here today. Again, my name is Alisa Sheard. I am with the women-owned small business federal contracting program with US Small Business Administration.

Today, I'm serving as your subject-matter expert to discuss the upcoming program changes as well as how to currently utilize the program with the current regulations as they are written.

Can we move to the next slide please? We are on slide 10. In today's presentation, I'm just going to give a high-level overview about the program. I am going to discuss the upcoming changes as it relates to the final rules that was published on May 11<sup>th</sup>. I will be outlining what the eligibility criteria is and its current state, and none of the

eligibility criteria have changed. Then I will get into, from [0:07:31 **inaudible**] perspective as acquisition professionals, how to use the program during the pre-solicitation process, and for pre-award things that you should consider. Then I'll also touch on the procedures for our validating a firm as a participant and our program by utilizing certify.SBA.gov.

Onto slide 11, please and onto slide 12. Great. Many of you have probably heard about the program and that is why you are all joining the call today, and I just kind of want to go over what the program is about and why it was created.

The program is a part of the Small Business Act, section 8(m) in particular, and it's a procurement mechanism to ensure that women-owned small businesses have an equal and opportunity to participate in federal contracting.

The SBA does set the goal for the prime contracting goal for women-owned small businesses and this program, the women-owned small business federal contracting program, is an addition to that, a component of that prime contracting goal. I want to make sure; I'll repeat that again: It is in addition to. This program was created to help level the playing field for women-owned small businesses, to help build their capacity, and to provide opportunities in industries that have been identified as where women-owned small business have been underrepresented or substantially underrepresented.

Next slide, slide 13, please, and then slide 14. On May 11<sup>th</sup>, there was a final rule polished in the Federal Register to put forth and outline what congress had mandated in the National Defense Authorization Act of 2015, and SBA is formalizing, through this regulation publication, the formal certification process and what that will look like for a firm that wishes to participate and apply for SBA's program.

[0:09:45 **inaudible**] program participants will be able to apply via our free online certification platform and they will still have the option to utilize a third-party certifying entity. There will be a cost associated with using those organizations, but SBA's option will be available for free.

The new certification process will allow current and active participants will be accepting existing qualified other certifications as well as the CVE certification will also be acceptable for submission for applying for the program.

One other provision that I want to make sure that everyone is aware of: Once the program is formalized, we have two different dates; July 15<sup>th</sup>, and I will highlight some more of that, and October 15<sup>th</sup>. On October 15<sup>th</sup>, SBA is coordinating with GSA so that as program participant, Sam.gov profile will begin to display that they are active participants of our program based on determinations of their eligibility criteria by SBA and so what we are hoping for, by October 15<sup>th</sup>, is that COs will no longer have to take the additional step of logging in to certify.SBA.gov and validating documents of women-owned small business program participant. I just want to make sure that that is clear. Once on October 15<sup>th</sup>, we will be updating SAM.gov to utilize WOSB program participant certification on a firm's profile and validation can be done on that page.

Onto slide 15, please. And the key dates that you want to remember and to make note of. At this time, we are notifying all current active WOSB participants that are self-certified; meaning they have completed the necessary steps of proof of sales self-certification. We are notifying that they must download their current documentation. The current platform that they have self-certified will be decommissioned later this calendar year and, therefore, they will be moving into a new platform to formally apply for formal certification, and so we are in the process of notifying all self-certified firms that they will be transitioning and to make them aware that they should begin to download any documentations that are retained in that system.

On July 15<sup>th</sup>, SBA will begin the formal application process and WOSB (women-owned small businesses) can begin to submit applications for initial processing. Firms that are third-party certification, firms that are 8(a) participants, firms that are CVE participants, as well as firms that are women-owned small business that believe their documentation reflects that they represent as an eligible participant, would be able to begin applying for the program.

On October 15<sup>th</sup>, SBA will begin to issue decisions. All of those firms that have submitted applications will begin to start receiving notification from SBA whether their documentation submitted meets the eligibility criteria for the women-owned small business federal contracting program.

Please take note the bullet at the bottom, self-certification, will remain available for firms in certify.SBA.gov until October 15<sup>th</sup>. After October 15<sup>th</sup>, we will turn off the self-certification function. I just want to repeat again; firms can still continue to self-certify until

October 15<sup>th</sup> and then we will no longer allow for a firm to submit any activity for self-certification purposes after that date.

Slide 16, please. Again, the slide here does reiterate that information. What can firms expect on October 15<sup>th</sup>? Not only would they begin to receive notification of their certificate, analyst will have the ability to complete all of their activity within our new certification system. They will receive a formal letter of approval or decline from SBA, and if they do receive a decline letter, the firm will have the ability to reapply to the program after 90 days and they have to tell us how they overcame that deficiency.

As I've stated earlier, we are working with SAM.gov to incorporate onto a program participant's SAM.gov profile that they are a program participant if they have a received a determination of approval and meeting the criteria for the WOSB program.

Onto slide 17, please. About our third-party certifiers. Currently, at this time, we have only four approved third-parties entity. The four are outlined here on this slide. They will continue to be our certifiers, they have signed agreements to continue to do so, and firms will still have the option to utilize their services to be granted a certificate, and then take that certificate, and upload it into SBA system to meet and satisfy our program requirement.

Slide 18, please. Some other program changes that I pretty much mentioned, I just want to reiterate here, is that we will begin to accept certificates from firms that are participants, and the Department of Veteran Affairs' Center for Verification and Evaluation, we will be allowing firms to submit that certificate with their application as well as 8(a) participants that received approval letters and have received a positive determination from their annual review. They will be allowed to upload that documentation as part of their application process.

Effective July 15<sup>th</sup>, we will be making some changes to how we evaluate our economic disadvantage status and this was to align the 8a program with the economically disadvantaged women-owned small business standards and so we are aligning those provisions so that they are measured in the same way because firms that are given 8a designation are automatically determined to be economically disadvantaged women-owned small business. We work to align those thresholds.

Another provision that was changes just for information purposes is that funds invested into an individual IRA account, SBA will no longer be counting that towards determining their net worth. We

will be subtracting that value out and negatively impacted firms that were still viable, but not eligible to pull money out of their particular IRA account.

Next slide, slide 19, please. Some contracting changes that I want to make you aware of in today's training is, again, on October 15<sup>th</sup>, you, as a contracting officer, will no longer have to enter certify.SBA.gov to validate documentation. You'll be able to see that on the firm's SAM.gov profile whether or not they are a participant of this program and whether or not SBA has given them official approval letter.

Another provision that has been added into our regulation is that because we are moving to a formal application process, we've added a component to expedite pending applications if a firm is identified as an apparent successful offer for a contracting opportunity and we will process those applications within 15 calendar days. This provision applies not only to SBA, but also to our third-party certifiers. If a firm has decided to utilize a third-party certification organization, they can still be able to... if they have been identified as an apparent successful offer, the third-party certifier is obligated to also expedite their application upon SBA notifying them that a buying activity has selected that firm.

I wanted to also outline... and this slide deck is available for usage afterwards as a resource, the WOSB contract administration page that you all, as contracting officers, may utilize and go to visit for help as you're trying to navigate using the program. Then the last two bullets are the most important bullets to be aware of.

For solicitations posted between October 1<sup>st</sup> and October 15<sup>th</sup>, and I just want to make this sure that this is clearly noted, that firms that are self-certified would be eligible for those solicitations as long as they have submitted and uploaded the necessary documents to fulfill self-certification.

Any solicitation posted on or after October 15<sup>th</sup>, a firm must have received formal certification from SBA affirming that they are approved and meet the eligibility criteria to be eligible for that solicitation. Again, on or after October 15<sup>th</sup>, the firm would have had to either received formal determination from SBA or in the process of receiving formal determination, and we can expedite that particular application.

Onto slide 20, please. I just want you to be aware of some of the up-to-date changes. We have a couple of resources available for you. We have a website, using our new campaign to ensure that firms

understand the purpose of the program and making sure that they're procurement ready, is our WOSB Ready campaign and you can visit [SBA.gov/WOSBready](https://www.sba.gov/WOSBready).

We also are encouraging firms to visit, of course, our district offices, and we have provided our local district offices with resources and a tool kit on advising and guiding small businesses that understand the women-owned from a federal contracting program and, of course, our procurement technical assistance are always readily available to provide guidance and advise to our small businesses.

Also, currently on the website, there is an FAQ to help and guide small businesses of the questions that they may have about the program and some of the regulatory changes, as well as we break out the certification process based on a firm's status if they are already a program participant or if they are not a program participant. All of these things can be found on our website.

Onto slide 21 and slide 22, please. Let's get into what is the program about and how do we distinguish the difference between a women-owned small business and an economically disadvantaged women-owned small business.

EDWOSB is a subset of the WOSB category. There are 444 eligible NAICS code that can be utilized for setting aside a contract for the women-owned small business federal contracting program; so that means that if your contracting opportunity, your requirement does not suit as their primary NAICS code, one of the 444 NAICS code, then you cannot utilize the WOSB set-aside for that procurement; so that is one of the provisions we'll walk through in just a little bit. I just want to be clear, there are 444 designated NAICS code for the purposes of either a WOSB or an EDWOSB firm.

Next slide please, slide 23. For the purpose of changes as it relates to the program, many things will remain the same. Of course, a firm would have to ensure that 51% of their ownership by either one or more women, are women basically, that they satisfy the majority ownership.

Also, a woman has to serve as the highest officer of that firm. The project has to be under the 444 suitable NAICS code. The woman owner has to also demonstrate that she has managerial experience and is in charge of the daily operations, the day-to-day needs of that business.

This program is a little different as far as something like our 8a program. There is no minimum time of business required. Typically



for our 8a program, firm owners are required to have a minimum of two years in business; otherwise, they would need to complete a waiver; that does not exist for these purposes of the women-owned federal contracting program.

Next slide please, slide 24. For economic disadvantage requirements, in order to qualify, these provisions remain the same at WOSB criteria. Firm owners' personal net worth minus liabilities must be less than \$750,000. Their three-year average growth income must also be \$350,000 or less. Then the fair market value of all of their assets have to be six million dollars or less.

Again, I just want to reiterate here, we will be subtracting out any IRA value from any retirement accounts, will no longer be counted in these calculations.

Please, slide 25. Thank you. Some unique aspects about the women-owned federal contracting program is just, again, not all NAICS codes... so not every project is suitable for the program. Here on this page, and you're welcome to click on this link later on, there is a list found on our webpage of the 444 NAICS codes that are available for the purposes of the program.

In 2021, SBA will be conducting a study to reevaluate the list of current NAICS codes and as a result of that study, we may be adding more, we may be removing more; but until that study is completed, we will be only referencing the 444 NAICS codes.

Women-owned small businesses must put their eligibility document in our current program repository. Then, at this time, under the current regulations, the CO must verify whether the offerer has submitted those documents. Currently, if you are using a women-owned small business set-aside procurement and you decided to either sole-source it or to compete the project, that CO must verify that the apparent successful offerer, has submitted all the required documents in our system; that is a step that you all are currently responsible for completing.

Slide 26. Here, I just have a couple of questions for you all to think about as we're going through today's presentation, and just to reiterate and reinforce things that are discussed. EDWOSB submit an offer on a set-aside for a WOSB. When I've done this presentation in the past, I normally have like polling done; but I wasn't sure whether we could do that today, so I'm just going to put forth the questions. I do have one answer in the chat that said yes and that is correct. EDWOSB may submit an offer for a WOSB set-aside, as in EDWOSB is in the subset of the larger pool of WOSB NAICS code.

Next slide, 27; and next slide, 28. With any set-aside consideration, you all are typically walking through this process of if the procurement is valued over 250K, could this procurement be set-aside for a small business or one of the small business social economic groups? 8a, HUBZones, service-disabled vet, or WOSB. You're evaluating whether or not it meets the rule of two, is the project fair and reasonable, and then making sure that the work is not already within the 8a program.

You're also evaluating the thresholds of the project. Is the dollar value possible for a sole-source award, or if none of those factors exist, should we consider this just as a general small business' set-aside or moving it to something that's unrestricted?

Next slide please, 29. Again, reiterating that, you're looking at industries. This program is basically industry-based, meaning that your requirement has to fall under the selected NAICS code and then you're evaluating, "Can the rule two be met in order to determine if I should compete this as a WOSB set-aside?" Then you must ensure that you can get fair market price in order to post the solicitation as the competition.

Next slide please, and we're on slide 30, everyone. Here on this slide, SBA is just providing a recommendation of language that you can utilize prior to October 15<sup>th</sup>. Prior to October 15<sup>th</sup>, solicitation synopsis can utilize this language into incorporating for any competitive women-owned small business set-aside. We encourage you all to utilize this, so that followers make sure that they have followed and complied with SBA's requirements in order to fulfill self-certification.

Slide 31, please. For a sole-source procurement, you are following these steps again. You're making sure that eligible NAICS are suitable, that it's either WOSB NAICS code or an EDWOSB NAICS code for the project. The project is at a fair reasonable price; it can be awarded as such. The threshold for that particular contract has to be \$4 million for services or no more than 6.5 million dollars for manufacturing; that's the threshold for sole sourcing it at WOSB or EDWOSB set-aside.

Then, also, you have to ensure that they're the only one WOSB that can perform that. The rule two would not exist if you are trying to sole source the work to WOSB or EDWOSB, and your market research would need to support that and justify that.

Next slide, slide 32, please. The next couple of slides are just walking you through the decision-making process and just to be a resource

for you after this presentation. Of course, you want to first validate, “Does this project NAICS code fit the list of 440 NAICS codes that are available for this program,” and so we want to validate, “Are these authorized?” Then determine if the rule of two can be met.

Award, again, is the award reasonable, and then if the rule of two is met, meaning I have two WOSBs that can perform this work, then I know that I can then compete this as a WOSB set-aside and you may be able to receive offers from the suitable WOSB or EDWOSB forms.

Next slide, slide 33. Again, it’s repeating the same thing, but just from the EDWOSB’s perspective.

Next slide, slide 34. Here is a question for everyone, another question: If the NAICS code is authorized for WOSB, can the CO set the procurement aside for EDWOSB? I have a lot of no. Thank you. Yes, that is correct: No. You cannot set it aside if the NAICS code is authorized for WOSB. It has to be a WOSB set-aside, but EDWOSB firms can bid on it. They can put an offer on the opportunity.

Slide 35, please. WOSB **[0:32:12 inaudible]** so it’s just walking you through that process as well, adding in the thresholds of the procurement as well as the fact that the rule of two would not be met in this situation. There’s only one source, WOSB source, that can perform this work.

I want to add the bottom box there and I think I saw this question earlier. As there is no statutory authority to make the direct award, agencies are required to prepare and approve a J&A and it provides you all the FAR reference to understand what would be included in that J&A for a WOSB sole-source award.

Slide 36, please. Again, this is for the EDWOSB sole-sourcing it. It’s going over pretty much the same item and it’s also referencing the same section of the FAR to remind you that you would be completing a J&A for that sole-source award.

Slide 37. These are, again, elaborating on the sections of the FAR that provides for establishing sole-source authority and then also outlining the provision of the regulation that require you all to complete an approved J&A.

Slide 38. Another question that I have for you. This is a scenario and I think it’s also always good to have scenarios to be able to connect with what we’re discussing. I have a requirement calling for a contractor to provide sign-language interpretation services. The NAICS code is 541930, and looking at the visual that is below the question, can I do a WOSB set-aside? Based on the NAICS code,

market research indicates the rule of two can be met and that means I can compete. Correct. Yeah, this is correct. The NAICS code is set-aside and eligible for the WOSB program.

Next slide, slide 39. Here is another scenario: Agency solicitation calls for the contractor to provide staffing services. The NAICS code is 561320. Market research does indicate a rule of two can be met, but is there an eligible NAICS code for this procurement? Yes, that's correct. I'm getting a lot of nos. I think you guys are getting it, that's great. No, this NAICS code does fall under the list of the 444 eligible NAICS. It would not be an opportunity that we could set aside for the WOSB program.

Slide 40. Just one more scenario. I have an RFQ to purchase computer network equipment. NAICS code 541519. Again, rule of two can be met. Which one do I select? Am I selecting EDWOSB or WOSB based on what this NAICS code is for? I'm getting some great answers, awesome. WOSB is correct.

Slide 41. On this slide, we outlined the eligibility requirements for joint venture and essentially for a joint venture, to be able to pursue social economic groups such as the WOSB program, the WOSB has to be the majority owner of the joint venture as well and here are a few other things that they must outline.

SBA does not review WOSB joint ventures. We only review 8a joint ventures at this time and, therefore, the JV agreement must be submitted in their proposal for an opportunity that they're using to go after, and their JV must adhere to the bullets that are outlined in this slide deck.

Slide 43, please. Things that you want to consider before you're awarding to a WOSB or EDWOSB firm. You want to make sure that, one, that they have checked their SAM boxes for the appropriate representation and certification and then if the set-aside only gets one acceptable offer from a WOSB from competing it, the CO may make award and there's the FAR reference for you to support making that award.

The last bullet is also very important because prior to... we officially began to issue certifications on October 15<sup>th</sup>. Contracting officers will need to verify that a firm have submitted the required documents in [certify.SBA.gov](https://certify.SBA.gov).

Slide 44, please. This slide also shows you where they are marking that they are participants in this program on their SAM.gov profile. Under their SAM's reps and search page, the slide shows you the

three areas that need to be marked in order to validate whether they are participant of WOSB or EDWOSB program.

Slide 45, please. Currently, the WOSB repository is held at certify.SBA.gov. This will change as we will transition to a new platform, and more information will be forthcoming about that platform and where firms will be able to go.

We no longer do paper forms anymore. We stopped that quite some time ago. Even for self-certification purposes, that can be completed fully online through certify.SBA.gov.

For you all, and I do have steps outlined here in the slide deck. I won't go through all of them, but I will highlight a few important pieces for you all—you do have to request access for that particular firm that you identified as the potential successful offerer or apparent awardee and validate that they have uploaded the required documents in our system.

Again, on October 15<sup>th</sup>, that responsibility will stop. You will no longer have to log in to certify.SBA.gov once we begin issuing formal certification.

If there are any questions on eligibility that may come up, you must file a status protest. A CO cannot disqualify an apparent successful offerer solely on the grounds that it failed to submit all the required documents. We've had this recently happen, and the CO did file a status protest, and we were able to assist the firm to quickly take corrective action and they were able to get successful award the WOSB contract. Some of them just may have stepped missed a step or didn't understand how to grant the CO access, and we will help facilitate that process if that issues does exist. I have team members that are willing to make the call.

Slide 46, please. One last question and this one is a little tricky: I have a requirement calling for the contractor to provide sign-language interpretation services. This is building off one of the questions we've used before. I've decided to compete my GSA scheduled contract holders as a WOSB set-aside. I posted the RFQ on **[0:40:19 inaudible]** received and evaluated about seven quotes and selected the apparent successful offerer. Do I need to verify whether the apparent successful offerer have submitted all the required documents to certify.SBA.gov? GSA does not validate that a firm have submitted the necessary documents, but you do have to verify that when they put their GSA scheduling, was their certification uploaded into our system because when they awarded

the schedule, that is when they should have uploaded also that they were a WOSB-certified firm.

Next slide please, slide 47. Qualifying as a WOSB. These next few slides are literally going through what are the qualifiers, what are the supporting documents that a firm would need to submit for self-certification.

For self-certification, they would have to make sure they register in SAM, upload the necessary documents, and this slide just outlines, for this particular category, what documents are required for each of these types of firms.

Slide 48. This next slide is, again, for self-certify documents that you are all, as contracting officers, would need to validate. For corporations, the documents you should see in their firm's profile, LLC partnership and a sole proprietorship. These are the documents that we should be looking for and validating within the WOSB repository.

Please note that for sole proprietorship, some firms do not have a doing-business-as document. Some sole proprietorship only complete their documentation via their tax returns and so you may only see a very couple minor documents that have been uploaded for sole proprietorship firms.

Slide 49, please. It looks like the same documents for EDWOSB. I'm sorry. It is a little different. EDWOSBs have to also upload a financial questionnaire and upload our version of a personal financial statement into our system, so you would see those additional documents in an EDWOSB firm.

Slide 50, please. For a third-party certify firm, they are allowed to just upload the certificates that are outlined below from one of the four listed approvers. This is just listing to your which organizations are approved to grant third-party certification. Any other certificate would not be acceptable other than those that are listed there.

Slide 51, please. Again, these are documents that a firm that carries an 8a certification would submit.

Slide 52. This is discussing when we are performing eligibility examinations and a protest examination. If we make a determination from our program examination or a protest that a firm does not meet the eligibility requirements, that firm must remove their designation off their SMA profile, and the CO shall not make award for that contract.

Slide 53, please, and the next slide please, I think slide 54. Again, here on this slide, because you all will likely download and utilize these slides, I just want to put the reminders in here. The current self-certification process will remain available for firms until October 15<sup>th</sup>. They will still be utilizing certify.SBA.gov and if they are getting an opportunity awarding a contract before that time window, they must upload their documents into the repository.

A lot of firms are concerned that it's a double effort, yes. Unfortunately, it is double effort; but because we are in a transition and we are moving into a formal certification process, unfortunately, that's what it is, how it is outlined at this time for them to be able to participate in the program and be eligible for contract awards.

If they are eligible for a contracting opportunity and you all are anticipating awarding before the October 15<sup>th</sup> date, they must submit the required documentation into certify.SBA.gov.

After October 15<sup>th</sup>, you all, as contracting officers, will not have to verify their documents in certify any longer; that information will be displayed on the firm SAM.gov profile and you'll need to validate that information on SAM.gov prior to contract award.

Slide 55, please. This is where you all would go to certify.SBA.gov. it's a screenshot of that website. You want to ensure that you are logging in as a government employee. If you are validating documents of a firm, you want to make sure you're entering the system from the right and correct route. Any other route, you may find that you are logging in as a public user and that will take you down the long path.

Slide 56, please. When you enter into a note and designate yourself as a contracting officer, you would go into the request access section and then in that request access section, you would enter in the [0:46:43 inaudible] number for the apparent successful offerer for that contract award.

Next slide please. It will then also ask you for the solicitation number, the solicitation's NAICS and the procurement type.

Slide 58, please. Here is a screenshot of what's completing that request would look like. You would be typing in the solicitation number, the NAICS code that is used for the procurement, what type of procurement it is whether it's a set-aside or a sole-source for WOSB or EDWOSB validating that you are a federal contracting officer, and then you would move forward to requesting access.

Slide 59, please. What will then happen is the firm when they're in their profile, they will receive a notification that you, as the contracting officer, are requesting access to review their documents, and then they will need to log in their own profile and grant you access to view their documents before you can award contract.

Slide 60, please. These steps just go through what a firm would see... what you would see, as the contracting officer, when you have different requested access for different firms for different opportunities.

Slide 61, please. Again, just screenshots for you all to walk you through those steps so that you all know how to utilize the system correctly; but should you have any questions, we do have an email address and analysts that are handling that inbox to assist you through any questions that you might have.

Slide 62, please. All right. Contacting us. These are resources for you. Again, it's where businesses can go to learn more about the program, where contracting officers can visit to understand how to navigate utilizing the program correctly, and where you can submit questions and if you're having issues with certify.SBA.gov where you may submit those questions.

Chris, if you want to open the floor for questions.

**Chris:** Yes, absolutely. Great job on that presentation. I know we have a lot of questions to go through. We're going to try to get through almost all of them. I know there's quite a few out there. Charles, if you are ready, shoot with the first question.

**Charles:** Sure, Chris. First [0:49:16 inaudible] award to a women-owned small business is a sole-source justification or limited sources justification required?

**Alisa:** Yes. If you are sole-sourcing and then procurement to WOSB or EDWOSB, a J&A is necessary.

**Charles:** Thank you. "Is the free online certification platform certify.SBA.gov free?"

**Alisa:** For the formal certification process, it will be on a new platform. We haven't given approval just yet to announce the name of the platform. As soon as we are, we will do a big splash to make everyone aware of where they will be directed to and where they should go to formally apply.

**Charles:** Thank you. "How are documents from certify.gov download it?"



**Alisa:** A firm would go into their profile, and click on the link of their document, and essentially save it. They may not need to do that. They may already have all of their documents saved somewhere, but sometimes going in and completing that action all at once puts it all in one place., so we wanted to make sure they had that option.

**Charles:** Thank you. "If an 8a or CVE certify, will we be able to synchronize the renewal dates?"

**Alisa:** Can you say that one more time?

**Charles:** Okay. It's a little broken up, but it says, "If 8a or CVE certify, will we be able to synchronize the renewal dates?"

**Alisa:** They will be able to synchronize. We will be granting 8(a)s, PPCs, and CVEs the similar dates of their cert to allow for less burden.

**Charles:** Okay. Thank you. "Will applicants using third-party certifiers have to pay for that service?"

**Alisa:** Yes. Third-party certifiers are external organizations of SBA, and they do have a cost associated with assisting and completing that process.

**Charles:** Okay. This question is, "If a business has self-certify in SAM as a women-owned small business, are they required to submit documentation, or do they simply mark WOSB?"

**Alisa:** That's a good question because it does cause a bit of confusion. On the [0:52:13 inaudible] you will know that there are three areas where a firm can "self-designate," is what we call it. The first one is there can be a women-owned small business in general, and the other two are a women-owned small business that participates in SBA's program or an EDWOSB business that participates in SBA's program.

If they are designating themselves as a participant in SBA's program, then they are eligible for the set-aside; meaning that if a contract is posted as a solicitation and set-aside for WOSB, they can bid on that opportunity if they satisfy the documentation.

For firms that are not designating as a participant, but they are a women-owned small business and they completed their self-designation, they can be counted towards the prime contracting goal. They would not, however, be eligible for WOSB or EDWOSB set-aside and I know that causes a bit of confusion, but I'd be happy to go over it again if need be.

**Charles:** Thank you, okay. Next question: "Will the status for women-owned small business show in the dynamic small business search tool?"

**Alisa:** Yes. It will start from our system, and feed to dynamic small business search first, and then it will populate into SAM.gov.

**Charles:** Okay, thank you. "Since firms won't be able to self-certify after October 15<sup>th</sup>, will five challenges still be permitted if a firm has a certification letter from the SBA or from one of the third-party certifiers identified?"

**Alisa:** Five protests are separate from status protest, and so a five protest would still be viable at that time. What we are certifying is that they meet the status, the eligibility criteria for WOSB set-aside. We are not certifying their **[0:54:28 inaudible]**

**Charles:** Great. Thank you. "Could you provide an example how the husband's participation in the business could affect the certification?"

**Alisa:** Sure. In some scenarios where a husband may have the technical experience and the spouse does not, we will ask more questions that those things may be considered as a possible reason why the women-owned small business owner is not in control, and so that is situational and case-by-case, and also other scenarios may be financial injections from the spouse, the husband, where we maybe have concern about whether they have any kind of control over the business.

**Charles:** Okay, thank you. Next question, it says, "I thought that once the firm has uploaded their documentation under the new program, it would no longer be necessary to verify documentation in the repository. Could you review or clarify this..." okay. Go ahead.

**Alisa:** I'm sorry. After October 15<sup>th</sup>, that will be the case. COs will not need to verify their documents in certify.SBA.gov. After October 15<sup>th</sup>, that's when that part of the rule goes into effect and a CO will no longer need to complete that stuff.

**Charles:** Great. Thank you. Next question: "If a women-owned firm wins a full and open or small business set-aside contract that is not under a women-owned small business NAICS, can an agency still count the award toward their women-owned small business goals?"

**Alisa:** Yes. They can count that towards their prime contracting goal, yes.

**Charles:** Thank you. "For award purposes on a particular economically disadvantaged women-owned small business acquisition, must an

economically disadvantaged women-owned small business have the applicable NAICS as their primary NAICS or can they have [0:57:00 inaudible]

**Alisa:** It does not have to be their primary NAICS, but it would have to be a NAICS that falls under their SAM and they are suitable as a small business under that particular NAICS code.

**Charles:** Okay, great. Thank you. "If two women are owners of the company, but each hold only 50% of the company, would this company still qualify?"

**Alisa:** If two women are the owners and they satisfy by them each owning 50%, they would satisfy majority ownership; so yes. As long as they are uploading their appropriate document and there are no other questions about some of their agreements that they have in place, we would likely approve them for certification.

**Charles:** Okay, thank you. "I did review..." okay. Let me go to the next question. "Will all women-owned small businesses have to be third-party certified after October 15<sup>th</sup> or will they still be able to self-certify and upload doc?"

**Alisa:** After October 15<sup>th</sup>, no firm will be able to self-certify. They will be able to submit applications via SBA three platform or they may use a third-party certifying organization.

**Charles:** Okay, thank you. "Contracting officers cannot follow the SBA's final rule until the FAR is also revised and parallel with the SBA's final rule. Is there an anticipated timeline for when the FAR will be revised and/or a DoD class deviation will be issued?"

**Alisa:** I cannot speak on whether when the FAR will be updated or whether a class deviation will be issued. You would have to talk with your leadership about those steps.

As far as the class deviation, what I can say is that SBA has taken their steps to request the FAR to be updated; that has been submitted to reflect the rule changes.

**Charles:** Okay, thank you. "Will the SAM.gov website info be updated to the beta.SAM.gov URL?"

**Alisa:** That would be more appropriate for GSA to answer.

**Charles:** Okay. "If we solicit a small business set-aside, and a women-owned small business submits the apparent, and the women-owned small business is the apparent successful offer, do we still need to validate at certify.gov to award to the women-owned small business?"

**Alisa:** Yes. Any procurement that is set-aside for the WOSB program that is posted prior to October 15<sup>th</sup>, the CO would need to complete the steps that we outlined in today's presentation and verify their document. Any procurement awarded prior to October 15<sup>th</sup>, would need that step completed.

**Charles:** Thank you. "Will procurement department or buyer be able to access women-owned small business information from public without log in like the HUBZone vendor?"

**Alisa:** Once we start the certification from a certification process, then it would be visible that they are program participant officially... "formally," I should say is probably the better word, after October 15<sup>th</sup>. Until that time, it's a self-designation and so that is available through dynamic small business search if they have made that self-designation.

**Charles:** Okay, and that's all the questions that I have for right now.

**Alisa:** Okay. No worries. If there are more questions, as I've stated Chris and Charles, I'll be more than happy to kind of go through any final questions that have been presented and you all may decide to share it if needed.

**Chris:** Great. Alisa, thank you so much. Would you want them to email you directly or send an email to SBA Learning?

**Alisa:** Either or. SBA Learning or WOSB@SBA.gov. We're more than happy to answer their questions if they want to submit them directly to the program.

**Chris:** Okay, great. Alisa, thank you so much. There's so many questions that have been great. A lot of involvement. It's a great presentation and all the participants will be able to utilize the slide deck afterwards to reference if they have any issues, so thank you for that.

Once again, if you do have any questions that were unanswered, please send an email either to WOSB@SBA.gov or SBA Learning at SBA.gov, and we'll ensure those questions are answered for you.

Once again, thank you for your support and attendance in today's session, and be safe, and we'll see you next month. Thank you.

**Candice:** That concludes our conference. Thank you for using AT&T Event Conferencing Enhanced. You may now disconnect.