

# Use Contracting as Your Secret Weapon for Ongoing Business Development

WBC Leadership Conference 2023

Presented By: Alisa Joseph & Jackie Perrault





## Meet the Presenters



**Alisa Joseph**

COO/Director of Programs

USBC/Greenwood Women's Business Center

Alisa provides oversight to the WBC in Tulsa, OK and is instrumental in its formation. She provides the strategy, development and implementation of programs that serve USBC and GBC clients.



**Jackie Perrault**

Director

Jacksonville Women's Business Center

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# MENTI METER



Question: What types of certifications are your clients seeking resources or technical assistance?

# MENTI METER



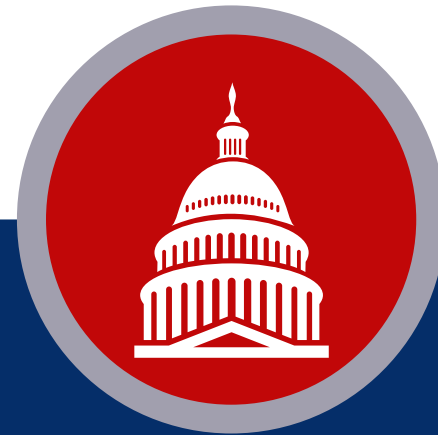
Question: Is your WBC currently offering curriculum on certifications and contracting opportunities?

# Types of Certifications



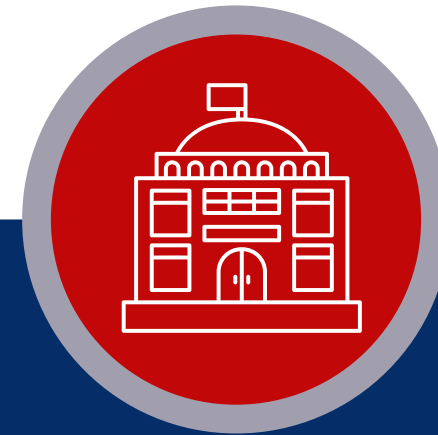
## **FEDERAL: WOMAN-OWNED SMALL BUSINESS (WOSB)**

The federal government's goal is to award at least 5% of all federal contracting dollars to women-owned small businesses each year.



## **STATE CERTIFICATION PROCESS**

State contract means an agreement or contract with the state or any state agency or any quasi-public agency, let through a procurement process or otherwise, having a value of fifty thousand.



## **LOCAL (CITY/MUNICIPALITY) CERTIFICATION PROCESS**


Local governments have numerous contracting options available for entering into non-public works contracts with private companies and other public agencies.

# TYPES OF CERTIFICATIONS: FEDERAL

## **WOSB: Woman-Owned Small Business / EDWOSB: Economically Disadvantaged Women-Owned Small Business**

- To qualify as a WOSB, your small business must be for-profit and 51% owned and operated by women who are U.S. citizens and work within the business full-time.
- If you're looking to qualify as an EDWOSB, your business must meet all of the above requirements for a WOSB, as well as the economic requirements of an 8(a) certified business. If you already have an 8(a) certification, you can also apply for an EDWOSB certification as well. You can apply for both woman-owned business certifications through the SBA's website.

## **8(a) Business Development**

- To be eligible for the 8(a) program, your small business must be at least 51% owned and controlled by U.S. citizens who are economically and socially disadvantaged. Additionally, the owners must manage day-to-day operations, make long-term decisions, and have a personal net worth that is less than \$750,000 and a three-year average adjusted gross income of \$350,000 or less.
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# TYPES OF CERTIFICATIONS: FEDERAL

## **VOSB: Veteran-Owned Small Business / SDVOSB: Service-Disabled Veteran-Owned Small Business**

- With these certifications, you're granted competition for certain contracts that are set aside for veterans and veterans who became disabled while in the act of service.
- To qualify for these certifications, a small business must be at least 51% owned by one or more veterans who manage the business daily.

## **HUBZone: Historically Underutilized Business Zone**

- To qualify for the HUBZone program, your small business [must be located in](#) a HUBZone, have at least 30% of its employees living in a HUBZone, and be 51% owned and controlled by U.S. citizens, a Community Development Corporation, an agricultural cooperative, a Native Hawaiian organization or an Indian tribe.





# SMALL BUSINESS CONTRACTING GOALS

The government works to make sure small businesses get at least 23% of all federal contracting dollars.

Additionally, the government tries to award a certain percentage of all federal prime contracting dollars to small businesses that meet certain socio-economic conditions.

Small business category	Contracting dollar award goal
Women-owned small business	5%
Small disadvantaged business	12%
Service-disabled veteran-owned small business	3%
Small business in a HUBZone	3%



# TYPES OF CERTIFICATIONS

## CITY, COUNTY, OR STATE & CORPORATIONS

**WBE: WOMEN BUSINESS ENTERPRISE**

**MBE: MINORITY BUSINESS ENTERPRISE**

**DBE: DISADVANTAGED BUSINESS ENTERPRISE**



# FORMULATING YOUR STRATEGY

## Be a Convener of Resources

- You don't have to be an expert - just understand the basic elements of contracting/procurement
- Employ a referral system - Identify your ecosystem partners and utilize them **with** your clients

## Utilize a Three-Step Approach

- Build Relationships - your network can include corporate, educational, municipal, state and federal partners that you should engage with regularly
- Training is critical - whether you host or collaborate with Procurement Technical Assistance Center (PTAC), SBA District Offices, Small Business Development Centers (SBDCs), local procurement partners, etc. - access to training resources is critical in the preparation and completion of a successful procurement strategy
- Collaboration - It's important to understand the contracting landscape. Learn the sites that display contracting opportunities. Corporations usually have a portal (e.g, ARIBA) where they host their upcoming needs. Government agencies usually have a contracting page and a vendor page that identifies certified firms. Also, there are contracting events that take place through trade associations, government agencies, etc. that you can attend in person or engage online. Use social media to follow key partners so that you receive regular updates

# DON'T LET FEAR STOP YOU

## **Put Your Collaboration Skills to Good Use**

- Communication - Meet regularly with key Contracting Officers and OSDDBU contacts across corporate, municipal, state and federal agencies
- Understand the uniqueness of each contracting contact - the needs of a corporate partner are a little different than government agencies - learn to toggle between the two

## **Membership Has Its Benefits - Utilize SBA and Diverse Chamber Certifications as a Tool**

- If a firm is looking to qualify as an EDWOSB, the business must meet all of the above requirements for a WOSB, as well as the economic requirements of an 8(a) certified business. If you already have an 8(a) certification, you can also apply for an EDWOSB certification as well. You can apply for both woman-owned business certifications through the SBA's website
- Encourage certification as a business development tool – WOSB, MBE, DBE, etc. Incorporate local PTAC offices to offer sessions on contracting as a solution and how best to identify this for firms
- Collaborate as 43 WBCs and meet monthly/quarterly as a strategy team to work as a collective in gaining contracts for our firms and sharing best practices

# RELATIONSHIPS: THE KEYS TO SUCCESS

## Ongoing Advocacy

- Leverage strength in numbers with all WBCs convening with federal OSDDBUs to illustrate need and define real opportunities
- Formulate MOUs or design cohorts to effectively measure results – real time data - you can't advocate and support what you don't know

## Next Steps

- Institute a referral process supported by ongoing training as a pipeline - highlight local WOSB/MWBE programs and understand the Tiered contracting process - Tier 1: P-Card (credit card), Tier 2: Subcontracting, Tier 3: Prime Contracting, Tier 4: Sole Source
- Reach out to host/co-host a Procurement and Contracting webinar or workshop; encourage local alliances to serve your clients
- Create a dictionary of terms to help navigate - breakdown the acronyms to more effectively understand the category best suited for your client



# MENTI METER



Question: Do you feel more confident in starting the process to utilize contracting as a tool for your clients?

# Q&A

Feel free to ask your questions

## Connect with the Presenter



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