

# Successful Growth Strategies in the Government Marketplace

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HOW TO GO AFTER THE **RIGHT** OPPORTUNITIES FOR YOUR BUSINESS



# Other Workshops Dates

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- **September 16 - Milwaukee**
- **September 17 - Green Bay**
- **September 22 - Wausau**
- **September 24 - Lac du Flambeau**
- **September 29 - Racine**
- **October 1 - Milwaukee**
- **October 6 - Madison**
- **October 8 - La Crosse**
- **October 13 - Milwaukee**
- **October 14 - Viroqua**

# Supporting Partners

- [African American Chamber of Commerce of Wisconsin](#)
- [American Indian Chamber of Commerce of Wisconsin](#)
- [Brown County Public Library](#)
- [Greater Green Bay Chamber](#)
- [Great Lakes Inter-Tribal Council, Inc.](#)
- [Hispanic Chamber of Commerce of Wisconsin](#)
- [Juneau County Economic Development Corporation](#)
- [LaunchBox of Racine](#)
- [Milwaukee Urban League, Inc.](#)
- [National Association of Minority Contractors](#)
- [Native Diversification Network Procurement Technical Assistance Center](#)
- [Vernon Economic Development Association](#)
- [Wausau Region Chamber of Commerce](#)
- [Western Dairyland](#)
- [Wisconsin Department of Administration](#)
- [Wisconsin Department of Economic Development](#)
- [Wisconsin Department of Transportation](#)
- [Wisconsin Department of Veterans Affairs](#)
- [Wisconsin Indian Business Alliance](#)
- [Wisconsin Women's Business Initiative Corporation](#)
- [Wisconsin SBDC – La Crosse](#)

# What We Will Be Talking About Today

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## **Business**

### **Opportunities**

- Federal Government
- State Government
- Local Government
- Tribal Government

### **Strategic Plan**

## **Overcoming Obstacles**

- Finance
- Building Capacity
- Performance
- Fear of the Unknown
- Sales and Marketing

### **Resources for Small Business**

## **ABOUT Marketplace 2015**

# Business Opportunities – Federal Government

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# SOME BASIC PRINCIPALS


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- **There MUST be a need**
- **There MUST be money to pay for the product or service**
- **YOU MUST be COMPETITIVE**
- **YOU MUST MAKE MONEY**
- **YOU MUST have the CAPABILITIES, CAPACITY and RESOURCES to support the requirement**

# Federal Government

[www.sam.gov](http://www.sam.gov)

[View assistance for SAM.gov](#)



USER NAME

[Forgot Username?](#)

PASSWORD

[Forgot Password?](#)

[LOG IN](#)

[Create an Account](#)

[HOME](#) | [SEARCH RECORDS](#) | [DATA ACCESS](#) | [GENERAL INFO](#) | [HELP](#)

⚠ SAM.gov will be down for a scheduled maintenance window Saturday 09/12/2015 from 8:00 AM to 12:00 PM (EDT)

#### CREATE USER ACCOUNT

Your CCR username will not work in SAM. You will need a new SAM User Account to register or update your entity records. You will also need to create a SAM User Account if you are a government official and need to create Exclusions or search for FOUO information.

[Create User Account](#)

#### REGISTER/UPDATE ENTITY

You can register your Entity (business, individual, or government agency) to do business with the Federal Government. If you are interested in registering or updating your Entity, you must first create a user account.

[Register/Update Entity](#)

**New!** Use the SAM Status Tracker to: [Check Status](#)

#### SEARCH RECORDS

All entity records from CCR/FedReg and ORCA and exclusion records from EPLS, active or expired, were moved to SAM. You can search these records and new ones created in SAM. If you are a government user logged in with your SAM user account, you will automatically have access to FOUO information.

[Search Records](#)

#### WHAT IS SAM?

The **System for Award Management (SAM)** is the Official U.S. Government system that consolidated the capabilities of CCR/FedReg, ORCA, and EPLS. There is NO fee to register for this site. Entities may register at no cost directly from this page. User guides and webinars are available under the Help tab.

[Need Help?](#)

[NEWS AND ANNOUNCEMENTS](#)

[USER GUIDES/HELPFUL HINTS](#)

[ATTENTION EXTRACT AND WEB SERVICE USERS](#)

# Federal Government

www.fbo.gov

The screenshot shows the homepage of the Federal Business Opportunities (FBO) website. At the top, there is a blue header with the logo "FEDBIZOPPS.GOV" and the text "Federal Business Opportunities". To the right of the header are logos for "IAE", "E.GOV", and "USA.gov". Below the header is a navigation bar with tabs for "Home", "Getting Started", "General Info", "Opportunities", "Agencies", and "Privacy".

The main content area features a search bar with the text "Search more than 29,200\* active federal opportunities." Below this are several dropdown menus and input fields for filtering search results: "Posted Date" (set to "Last 90 Days"), "Set-Aside Code" (set to "Any"), "Place of Performance" (set to "Any State or Territory"), "Type" (set to "Any"), "Keyword / Solicitation #", and "Agency". A "Search" button is located below these fields. To the right of the search fields, there is a link to an "advanced search form" and a note: "\* Notices posted within the last 90 days."

Below the search area, there is an "ATTENTION" section with a lightbulb icon, stating: "Agency users are responsible for properly uploading controlled, unclassified materials to FBO using the access control procedures for document packages and attachments detailed in the [FBO Buyers Guide](#). Do not upload ANY classified materials to FBO."

At the bottom of the main content area, there are two columns of text. The left column is titled "Buyers / Engineers" and states: "Government users may post, manage, and award opportunities." The right column is titled "Vendors / Citizens" and states: "Vendors and citizens may search, monitor, and retrieve opportunities."

On the right side of the page, there is a sidebar with several sections. The top section is titled "RECOVERY" and includes the text "Locate actions funded by the American Recovery and Reinvestment Act." Below this are two buttons: "SEARCH RECOVERY OPPORTUNITIES" and "SEARCH RECOVERY AWARDS". The next section is titled "FBO RECOVERY REPORTS" and includes two links: "Click here for Opportunities" and "Click here for Awards". Below this is a link: "Click here to learn more." The next section is titled "SMALL BUSINESS EVENTS" and includes the text "Learn more about the Small Business Central Event Listing or search now for events." Below this is a button: "SEARCH SMALL BUSINESS EVENTS". The final section is titled "VENDOR COLLABORATION" and includes the text "FBO now contains the Vendor".

# Federal Government

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## Manufacturing

Department of Defense <http://www.acq.osd.mil/mibp/>

## Construction

- US Army Corps of Engineers [www.usace.army.mil/CESB/Pages/Default.aspx](http://www.usace.army.mil/CESB/Pages/Default.aspx)
- US Department of Ag/Forest Service [www.da.usda.gov/smallbus/](http://www.da.usda.gov/smallbus/)
- Naval Facilities <http://www.navfac.navy.mil/>

## Commercial type goods and services

- General Services Administration [www.gsa.gov](http://www.gsa.gov)

## Mixed

- Department of Veterans Affairs <http://www.va.gov/OSDBU/>

## Research and development

- SBIR-STTR Program [www.sbir.gov](http://www.sbir.gov)

# Federal Government – targeting local agencies

- Department of Veterans Affairs – Milwaukee / Iron Mountain / Chicago
- US Forest Service – Rhinelander
- Forest Products Laboratory – Madison
- Oxford Prison – Oxford
- EPA – Chicago
- General Services Administration (GSA) – Chicago
- Tank Automotive Command (TACOM) – Rock Island
- Military Bases
  - Volk Field – Camp Douglas
  - Ft. McCoy – Tomah
  - 128<sup>th</sup> ARW – Milwaukee / 115<sup>th</sup> Madison
- US Army Corps of Engineers – St. Paul / Chicago / Rock Island / Detroit
- Naval Station Great lakes – North Chicago – [contracting moving]
- ALSO – SOME LARGE CONTRACTORS LIKE Oshkosh Corp and Marinette Marine Corp (looking for small firms)

# LARGE COMPANIES

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## Current Federal Contractors

- Small Business Subcontracting Plan
  - Small – HUBZone – Service-Disabled Veteran – Woman – Disadvantaged
- Subcontracting Directories
  - US SBA - <http://www.sba.gov/category/navigation-structure/contracting/contracting-opportunities/sub-contracting>
  - Department of Defense - <http://www.acq.osd.mil/osbp/sb/dod.shtml>
  - General Services Administration (GSA)  
<http://www.gsa.gov/portal/content/101195>

Use of various disadvantaged business categories is part of Corporate Culture of some large firms

Meetings, interviews, presentations, networking

- Marketing materials including business cards, capabilities statement, website and prepared “pitch”

# Business Opportunities – State Government

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# Certification Snapshot

Disadvantaged Business Enterprise (DBE)

aka Unified Certification Program (UCP)

## **CERTIFICATION BENEFITS:**

- Support Services are available to certified firms free of charge including technical, marketing and financial assistance.
- WisDOT offers two programs designed to assist DBEs making connections with Prime contractors: Mentor Connection (6-month) and Mentor Protégé (3-year).
- Mega project goal setting for DBE participation.
- UCP is a cooperative of Wisconsin cities, counties and airport authorities that benefit from USDOT funding.

## **ELIGIBILITY REQUIREMENTS:**

- a. Disadvantaged Status - Belong to an ethnic minority group: Native American, Black, Hispanic, Asian Indian, Asian Pacific or women.
- b. Ownership - Be at least 51% owned, controlled, and actively managed by a socially and economically disadvantaged person(s).
- c. Small Business Status – Must be a small business as defined by SBA size standard. It must not have annual average gross receipts over \$19 million in the three previous years or \$40 million for airport concessionaires.
- d. Independence – The business must not link to another firm that compromises the applicant's independence and the disadvantaged owner's equity.
- e. Personal Net Worth – May not exceed \$1.32 million (excluding primary residence and ownership in the business).

## **APPLICATION PROCESS:**

- Contact one of the four certifying members - Wisconsin Department of Transportation, Milwaukee County – Community Business Development Partners, Dane County Purchasing Division- Contract Compliance or City of Madison Department of Civil Rights – Target Business Enterprise Program

# NON-CERTIFYING PARTICIPANTS TO THE WISCONSIN UCP

The following non-certifying recipients in Wisconsin that receive USDOT financial assistance through the programs of FAA, FHWA and/or FTA agree to accept certifications approved by the UCP established by this agreement:

- (a) Austin Straubel Airport, Green Bay, Wisconsin.
- (b) Central Wisconsin Airport, Mosinee, Wisconsin.
- (c) Chippewa Valley Regional Airport, Eau Claire, Wisconsin.
- (d) La Crosse Municipal Airport, La Crosse, Wisconsin.
- (e) Outagamie County Regional Airport, Appleton, Wisconsin.
- (f) Rhinelander-Oneida County Regional Airport, Rhinelander, Wisconsin.
- (g) City of Appleton, Wisconsin.
- (h) City of Beloit, Wisconsin.
- (i) City of Eau Claire, Wisconsin.
- (j) City of Green Bay, Wisconsin.
- (k) City of Janesville, Wisconsin.
- (l) City of Kenosha, Wisconsin.
- (m) City of La Crosse, Wisconsin.
- (n) City of Oshkosh, Wisconsin.
- (o) City of Racine, Wisconsin.
- (p) City of Sheboygan, Wisconsin.
- (q) City of Superior, Wisconsin.
- (r) City of Waukesha, Wisconsin.
- (s) City of Wausau, Wisconsin.
- (t) County of Waukesha, Wisconsin.

# Certification Snapshot

## Minority-Owned Business Enterprise (MBE)

### **CERTIFICATION BENEFITS:**

- 5% bid preference on state purchases.
- 5% MBE utilization goal.
- All certified firms can participate in Marketplace, a statewide business marketing conference, at discounted rate.
- Certified firms are also eligible to be listed in the State of Wisconsin's Directory of Minority, Woman, and Disabled Veteran-Owned Businesses which is circulated to corporate buyers and purchasing agents throughout the state.

### **ELIGIBILITY REQUIREMENTS:**

- a. Belong to an ethnic minority group: Native American, Black, Hispanic, Asian Indian, Asian Pacific, Aleut, Eskimo, or Native Hawaiian. (The Department does not recognize women as minorities or base eligibility on the gender of an applicant.)
- b. Proof of ethnicity and citizenship
- c. Be at least 51% owned, controlled, and actively managed by minority group members.
- d. Serve a "useful business function" and have customers other than the State of Wisconsin.
- e. Must be at least one (1) year old under current ownership.

### **APPLICATION PROCESS:**

- Review the Pre-Certification Self-Assessment to determine eligibility  
<http://doa.wi.gov/Documents/DEO/Supplier%20Diversity/Pre-Certification%20Assessment.pdf>
- Proceed to <https://wisdp.wi.gov/> for online application
- Upload all supporting documents
- Follow annual update process
- Recertification takes place every three years

# Certification Snapshot

## Woman-Owned Business Enterprise (WBE)

### **CERTIFICATION BENEFITS:**

- All certified firms can participate in Marketplace, a statewide business marketing conference, at discounted rate.
- Certified firms are also eligible to be listed in the State of Wisconsin's Directory of Minority, Woman, and Disabled Veteran-Owned Businesses which is circulated to corporate buyers and purchasing agents throughout the state.

### **ELIGIBILITY REQUIREMENTS:**

- a. Be at least 51% owned, controlled, and actively managed by women group members.
- b. Proof of gender and citizenship for each owner
- c. Is currently performing a "useful business function" in the State of Wisconsin.
- d. Must be at least one (1) year old under current ownership.
- e. Provide a \$150.00 application fee made payable to the Department of Administration.

### **APPLICATION PROCESS:**

- Review the Pre-Certification Self-Assessment to determine eligibility  
<http://doa.wi.gov/Documents/DEO/Supplier%20Diversity/Pre-Certification%20Assessment.pdf>
- Proceed to <https://wisdp.wi.gov/> for online application
- Upload all supporting documents
- Follow annual update process
- Recertification takes place every three years

# Certification Snapshot

## Disabled Veteran-Owned Business Enterprise (DVB)

### **CERTIFICATION BENEFITS:**

- 5% bid preference on state purchases.
- 1% utilization goal was established under 2013 Wisconsin Act 192.
- All certified firms can receive technical and marketing assistance, including participation in Marketplace, a statewide business marketing conference.
- Certified firms are also eligible to be listed in the State of Wisconsin's Directory of Minority, Woman, and Disabled Veteran-Owned Businesses which is circulated to corporate buyers and purchasing agents throughout the state

### **ELIGIBILITY REQUIREMENTS:**

- a. Be at least 51% owned, controlled, and actively managed by disabled veteran group members.
- b. At least 51% majority owner(s) possess U.S. Department of Defense Form DD214 (Certificate of Release or Discharge from Active Duty) to prove service in the Armed Forces.
- c. Disabled Veteran document from the Department of Veteran Affairs or discharge paper from the branch of armed service, stating service connected disability rating under 38 USC 1114 or 1134 of at least 20%.
- d. At least 51% majority owner(s) are residents of Wisconsin and the business has its principal place of business in Wisconsin.
- e. Is currently performing a "useful business function" in the State of Wisconsin.
- f. Must be at least one (1) year old under current ownership.
- g. Provide a \$150.00 application fee made payable to the Department of Administration.

### **APPLICATION PROCESS:**

- Review the Pre-Certification Self-Assessment to determine eligibility  
<http://doa.wi.gov/Documents/DEO/Supplier%20Diversity/Pre-Certification%20Assessment.pdf>
- Proceed to <https://wisdp.wi.gov/> for online application
- Upload all supporting documents
- Follow annual update process and Recertification takes place every three years

# STAR IMPLEMENTATION UPDATE

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## State Transforming Agency Resources (STAR)

- **Replace 120+ different administrative systems**
- **Provide standardization between state agencies**
- **Tentative implementation schedule:**
  - **October 2015 – Uploading existing vendors from VendorNet to STAR (will include all vendors received contract and/or payment from the state within the past 18 months)**
  - **January 2016 – STAR and VendorNet 2.0 will be operational**

# STAR IMPLEMENTATION EXCEPTIONS

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- **WisDOT's implementation is scheduled for summer 2016**
- **UW will stay on SHOP@UW and use VendorNet 2.0 to post contract opportunities**
- **All Muni's will continue to use their own systems and use VendorNet 2.0 to post contract opportunities**

# CONTACT INFORMATION

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STAR: <http://STARPROJECT.WI.GOV/HOME>

VendorNet: (608) 264-7897 / (800) 482-7813

<http://vendornet.state.wi.us/vendornet/default.asp>

General Procurement Information

<http://www.doa.state.wi.us/divisions/enterprise-operations/state-bureau-of-procurement/solicitation>

# Business Opportunities – Local Government

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# COUNTY / MUNICIPAL GOVERNMENT CERTIFICATIONS

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# COUNTY / MUNICIPALITY Certifications

Organization Type	Certification	Agency	Website
County	<ul style="list-style-type: none"> <li>• ACDBE</li> <li>• DBE</li> </ul>	Milwaukee County	<a href="http://County.milwaukee.gov/cbdp/certificationervices.htm">County.milwaukee.gov/cbdp/certificationervices.htm</a>
	<ul style="list-style-type: none"> <li>• ESB</li> <li>• MBE</li> <li>• WBE</li> <li>• DBE</li> <li>• Section 3 Target Business</li> </ul>	Dane County	<a href="http://www.danepurchasing.com/contract_compliance.aspx">www.danepurchasing.com/contract_compliance.aspx</a>
Municipality	<ul style="list-style-type: none"> <li>• SBE</li> </ul>	City of Milwaukee	<a href="http://city.milwaukee.gov/OSBD#.U0rvglko9jr">city.milwaukee.gov/OSBD#.U0rvglko9jr</a>
	<ul style="list-style-type: none"> <li>• Target Business Certification Program</li> </ul>	City of Madison	<a href="https://www.cityofmadison.com/dcr/documents/TargetedBusCertPgm.pdf">https://www.cityofmadison.com/dcr/documents/TargetedBusCertPgm.pdf</a>
Other Entities	<ul style="list-style-type: none"> <li>• HUB</li> </ul>	Milwaukee Public School	<a href="http://www.milwaukee.k12.wi.us/portal/server.pt/comm/departments/338">http://www.milwaukee.k12.wi.us/portal/server.pt/comm/departments/338</a>
	<ul style="list-style-type: none"> <li>• SWMBE</li> </ul>	Milwaukee Metropolitan Sewage District	<a href="http://www.mmsd.com/procurement/SWMBE.aspx">http://www.mmsd.com/procurement/SWMBE.aspx</a>
	<ul style="list-style-type: none"> <li>• DBE</li> </ul>		<a href="http://www.ridemcts.com/Doing-Business-With-MCTS/dbe-support">http://www.ridemcts.com/Doing-Business-With-MCTS/dbe-support</a>
		Milwaukee County Transit System	

# PRIVATE CERTIFICATIONS

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# PRIVATE Certification

Organization Type	Certification	Agency	Website
Large Corporations	Company Internal Supplier Diversity Initiative	<ul style="list-style-type: none"> <li>• North Central Minority Supplier Development Council– Fee \$300 - \$750 based on revenue size</li> <li>• \$250 - \$500 annual recertification fee</li> <li>• Women’s Business Enterprise National Council (WBENC) – Fee \$350 - \$950 based on revenue size</li> <li>• \$350 - \$950 annual renewal fee</li> </ul>	<p><a href="http://www.northcentralmsdc.net/MbeCertification/Certification">http://www.northcentralmsdc.net/MbeCertification/Certification</a></p> <p><a href="http://www.wbenc.org/certification/">www.wbenc.org/certification/</a></p>

# Business Opportunities – Tribal Government

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DR. NICOLE BOWMAN, PRESIDENT, BOWMAN PERFORMANCE  
CONSULTANT (VIDEO)

# Business Opportunities – Tribal Government

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Dr. Nicole Bowman, President,  
Bowman Performance Consultant

# Strategic Plan –Moving Your Business Forward

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GENE WRIGHT, GRADUATE MANAGEMENT PROGRAM DIRECTOR,  
MSOE (VIDEO)

# Strategic Plan – How Can Your Business Move Forward

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Gene Wright, Graduate Management  
Program Director, MSOE

# Overcoming Obstacles – Finance

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DAVE KIRCHER, SENIOR VICE PRESIDENT, WISCONSIN BUSINESS  
DEVELOPMENT (VIDEO)

# Overcoming Obstacles – Finance

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**Dave Kircher, Senior Vice President,**  
**Wisconsin Business Development**

# Break

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# Overcoming Obstacles – Building Capacity

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JEAN THIEL, PRESIDENT, BELONGER CORPORATION (VIDEO)

# Overcoming Obstacles – Building Capacity

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Jean Thiel, President, Belonger Corporation

# Overcoming Obstacles - Performance

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MANISHA DOTSON, PRESIDENT, THE NISHA GROUP LLC.

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# Overcoming Obstacles – Fear of the Unknown

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MANISHA DOTSON, PRESIDENT, THE NISHA GROUP LLC.

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# Overcoming Obstacles – Sales and Marketing

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BRIGETTE BRIETENBACH, PRESIDENT, COMPANY B (VIDEO)

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# Overcoming Obstacles – Sales and Marketing

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**Brigette Brietenbach, President,**  
**Company B**



# SBA Resources

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FRANK DEMAREST, DEPUTY DISTRICT DIRECTOR, US SBA



# Overview

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Created: 1953

Mission: ...aid, counsel, assist and protect the interests of small business concerns...

Federal: Free...

Resources: Programs and Partners

Network

And much more

# SBA WI DO Resource Guide

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-Broken out into three primary sections:

- Counseling
- Capital
- Contracting

-National overview with WI specific info


-Other content

-Updated annually

-Available:

Online at [www.sba.gov/wi](http://www.sba.gov/wi)

Hard copy



**SBA** *Counseling*  
U.S. Small Business Administration

- Extensive network of resource partners  
Counseling services & classes free or low cost
- More than 19,000 served in Wisconsin in 2014
  - SCORE with locations throughout WI
  - SBDC's (12 with locations at UW extensions)
  - Women's Business Centers with various locations
- To locate offices near you: [www.sba.gov](http://www.sba.gov) and click on "get local assistance"

## What are the Government-wide Small Business Contracting Goals and Achievement?

Category	Goal	2012	2013	2014
Small Business	23%	22.25%	23.39%	24.99%
SDB (8(a))	5%	8%	8.61%	9.46%
HUBzone	3%	2.01%	1.76%	1.82%
Women	5%	4%	4.32%	4.68%
SD Vets	3%	3.03%	3.38%	3.68%



# ***Contracting***

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**Government-wide Small Business Contracting  
Goals are a floor—not a ceiling!**

**In 2014:**

**\$91.6 Billion to Small Business**

**\$3.6+ in Wisconsin**

**DoD Largest Purchasing Entity**



# *Contracting Programs*

- Federal: 8(a) Business Development
  - HUBZone
  - WOSB/EDWOSB
  - SDVOSB
  - HUD Section 3
- State
- Municipality
- Others



# *Contracting Resources*

- SBA HUBZone Help Desk and the WI DO
- HUD
- DoD
- Forestry Dept
- City and County Contracting Offices/Reps
- Wisconsin Procurement Institute
  - SAM
  - Certifications
  - RFQ's/Bids/Proposals
  - MORE!!

- 
- Some of the Various SBA Programs Available:
    - 7a
    - Express
    - Export
    - Seasonal CAPlines
    - Contract CAPlines
    - 504
    - Microloan



# ***Capital Resources***

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- Banks and Credit Unions dealing with SBA Programs
  - Community Advantage Lenders
  - Certified Development Centers
  - Microloan Intermediaries



# *Surety Bonds*

## *Three Types*

- ❑ ***Bid Bond:*** Guarantees that the bidder on a contract will enter into the contract and furnish the required payment and performance bonds if awarded the contract.
- ❑ ***Payment Bond:*** Guarantees that suppliers and subcontractors will be paid for work performed under the contract.
- ❑ ***Performance Bond:*** Guarantees that the contractor will perform the contract in accordance with its terms and conditions.\*  
(\*The term Final Bond means Payment Bond, Performance Bond or both Payment and Performance Bond.)

SEE SBA WI DO RESOURCE GUIDE FOR LIST OF AGENTS



# ***Surety Bonds Changes***

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- ❑ Surety Bonds raised from \$2 million to \$6.5 million
- ❑ For Federal Contracts with the contracting office stating a need the limit is raised to \$10 million.
- ❑ **NEW in 2014:** Expedited processing for bonds \$250,000 and less



# *Training*

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Over 100 free online courses at SBA.gov

- Business planning
- Finance
- Marketing
- **Government contracting-14 courses with multiple sessions**

Free webinars and call in sessions

Entrepreneurial education classes (targeted audiences)

- V-Wise (women veterans)
- Boots to Business: Reboot—includes all veterans; locations TBD for 2016
- Emerging Leaders (Urban CEOs)-in progress now



# ***SUPPLEMENTAL INFORMATION***



# *Mentor Protégé*

Formal relationship between larger firm and protégé firm to leverage federal contracting opportunities. Began in the 8 (a) program; recently expanded.

Benefits:

- **Technical and management assistance for protégé**
- **Prime contracting**--Mentors can enter into joint-venture arrangements with protégés to compete for government contracts.
- **Financial assistance-equity or loans**--Mentors can own equity interest up to 40% in protégé
- **Qualification for other SBA programs**--A protégé can obtain other forms of SBA assistance as the result of its good standing in the Mentor-Protégé program.



# *HUBzone Program- Eligibility*

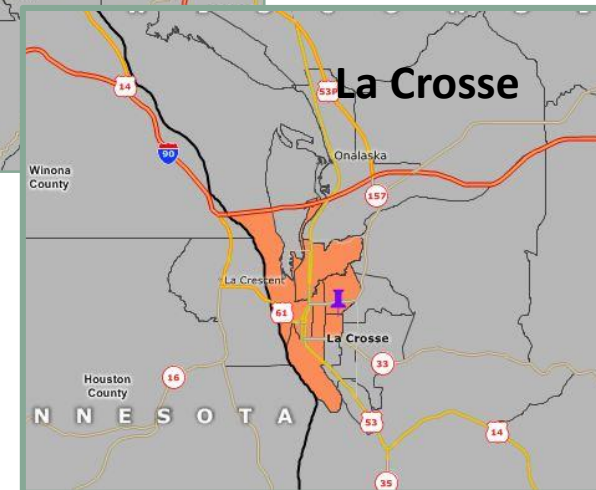
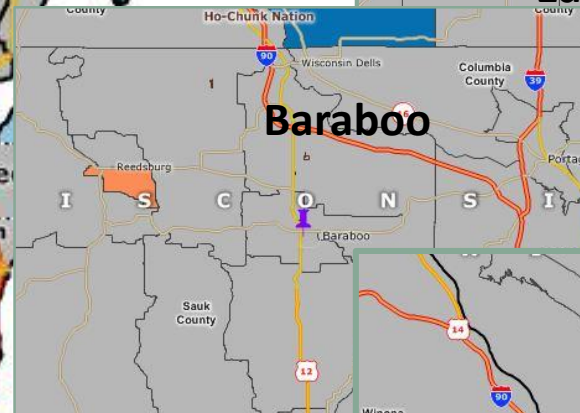
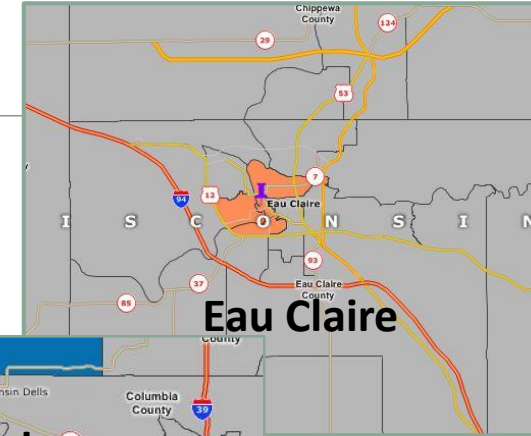
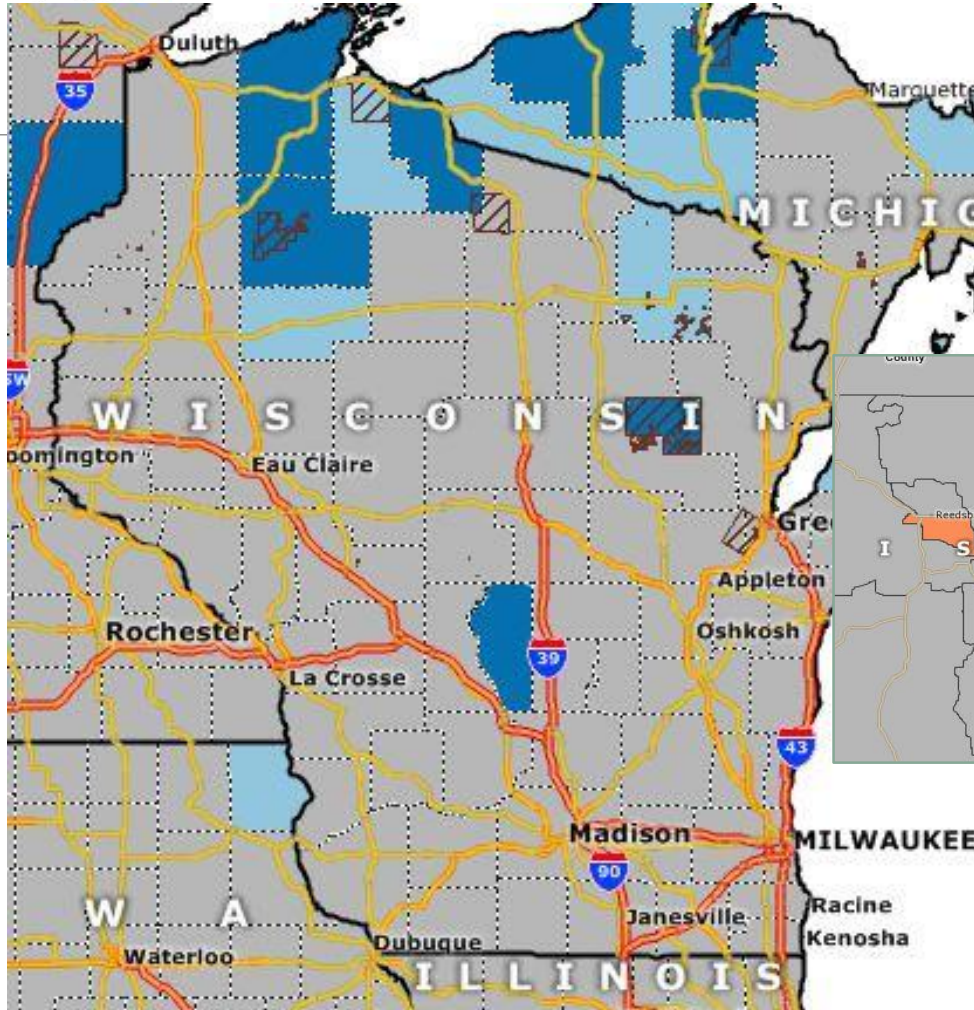
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- Meet small business size standards
- Owned/controlled by:
  - 51% U.S. citizens
  - CDC
  - Agricultural cooperative
  - Indian tribe
- Principal office in a HUBzone
- 35% of employees living in a HUBzone



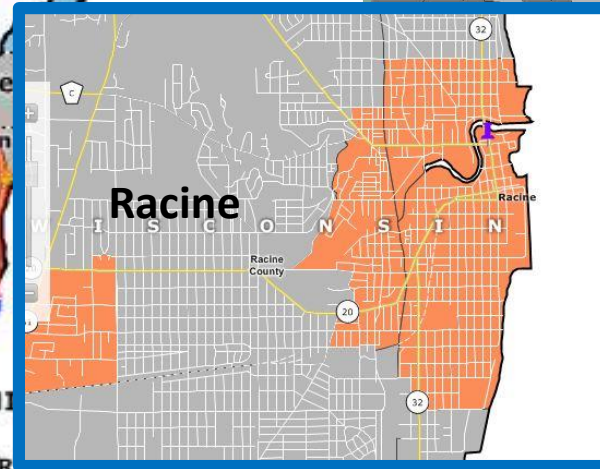
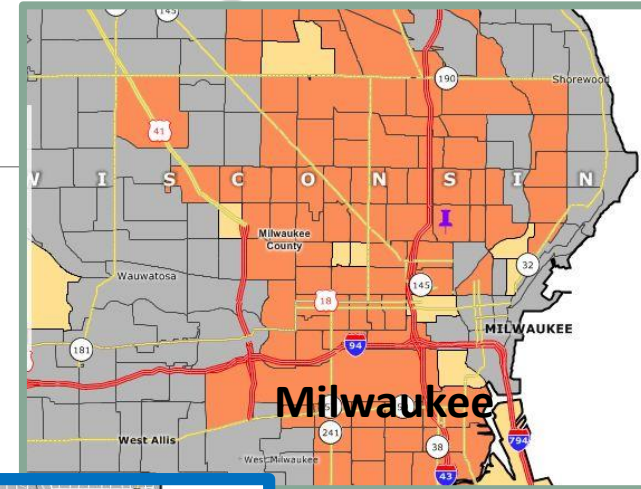
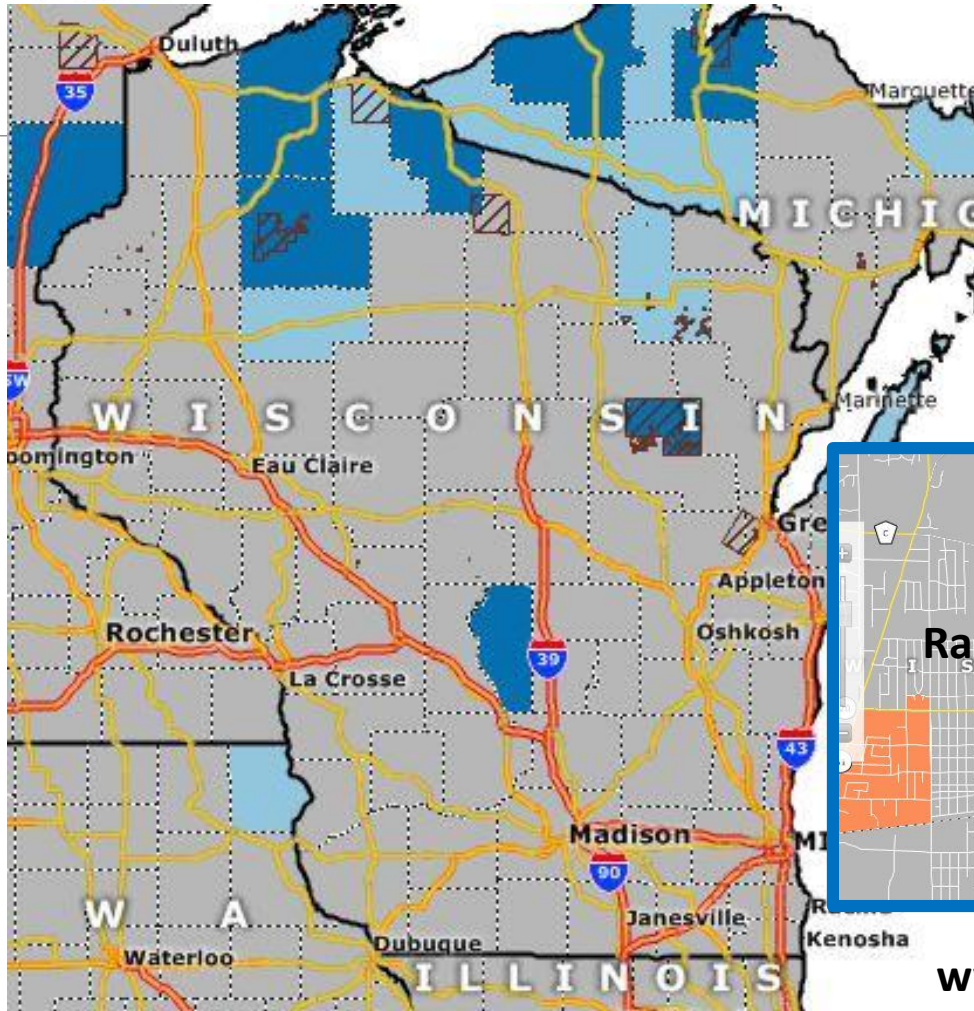
# HUBzone Maps

[www.sba.gov/hubzone](http://www.sba.gov/hubzone)





# HUBzone Maps



[www.sba.gov/hubzone](http://www.sba.gov/hubzone)



# ***WOSB Program- eligibility***

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- At least 51% directly owned by women who are U.S. citizens
- No limits on ownership
- Women manage day to day operations

## **EDWOSB-above plus:**

- Personal net worth less than \$750,000
- AGI \$350,000 or less
- Market value of assets less than \$6 million



# ***WOSB Program- certification***

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- Self certification-by WOSB or EDWOSB
- Registration in SAM required
- Contracting officer may request documentation
- Docs maintained in program repository

## **Third party can certify:**

- Federal or state agency or SBA approved 3<sup>rd</sup> party
- 8 (a) certification may be eligible



# ***SDVOB Eligibility***

- Business owned by a Service-Disabled Veteran (SDV)
  - **51% direct and unconditional ownership** by one or more SDVs
- Control of the business
  - **Long-term decisions, daily business operations, management** controlled by SDV(s)
  - **Ultimate control of the business entity** (partnership, LLC, corporation) by SDV(s)
- SDV must have:
  - **Management experience** to run the concern
  - **Ultimate managerial, supervisory control** of technical experts, license holders
- SDV need NOT have technical expertise or license



U.S. Small Business Administration

## 7(a) Loan Program

SBA's primary business loan program



- ❑ Broad eligibility requirements
- ❑ Wide range of financing needs
- ❑ Increase in the maximum 7(a) loan amount to \$5MM, guaranty amount to \$3.75MM.
- ❑ Maximum guaranty 85% up to \$150k
- ❑ Maximum guaranty 75% over \$150k



# *Express Loans*

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50% Guarantee

Up to \$350,000

Includes Lines of Credit

Lender makes credit decision

**Up-front fees waived for vets**



# ***Wisconsin Offices***

## **MILWAUKEE**

310 W. Wisconsin Avenue, Suite 400  
Milwaukee, WI 53203  
Phone: 414-297-3941  
Email: [wisconsin@sba.gov](mailto:wisconsin@sba.gov)

## **MADISON**

740 Regent Street, Suite 100  
Madison WI 53715  
Phone: 608-441-5261  
Email: [wisconsin@sba.gov](mailto:wisconsin@sba.gov)



WISCONSIN ECONOMIC  
DEVELOPMENT CORPORATION

**Governor's Conference on Minority Business Development**  
Welcoming minority, women and veteran-owned businesses

**October 29 and 30**

MARKETPLACE is the premier business capacity building conference of the year for minority, women and veteran-owned companies to learn how they can do business with state, federal and local agencies as well as corporations. These markets represent billions of dollars of annual purchasing, with special programs to include minority, women, veteran and disadvantaged business owners. For more than 30 years, this conference has provided opportunities for businesses to meet with potential buyers, identify funding sources, connect with business assistance resources and build their capacity.

[MarketplaceWisconsin.com](http://MarketplaceWisconsin.com)



**Governor's Conference on Minority Business Development**  
**Welcoming minority, women and veteran-owned businesses**  
**October 29 and 30**

## **Governor's Conference on Minority Business Development**

### **Welcoming minority, women and veteran-owned businesses**

#### **October 29, 2015**

- Free Workshops
- Reception

#### **October 30, 2015**

- Breakfast for Champions
- Exhibit Hall
- Buyer Meetings
- Keynote – Baly Ambegaoker, President, Centerpoint Inc.
- Networking Opportunities
- Governor's Award Luncheon

# Questions?

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**AND THE WINNER IS...**

# Assistance:

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## Wisconsin Procurement Institute

- **Joseph Smetak, CFCM**
  - (414)270-3600
  - [josephs@wispro.org](mailto:josephs@wispro.org)

[www.wispro.org](http://www.wispro.org)