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# Acquisition Hour: Certifications for Veteran Owned Businesses

October 18 | 1:00 - 2:00 pm

Presented by:

Shane Mahaffy, U.S. Small Business Administration (SBA)

Ben Blanc, WPI

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# Webinar Etiquette

## PLEASE

§ Log into the GoToWebinar session with the name that you registered with online

§ Place your phone or computer on MUTE

§ Use the QUESTIONS option to ask your question(s).

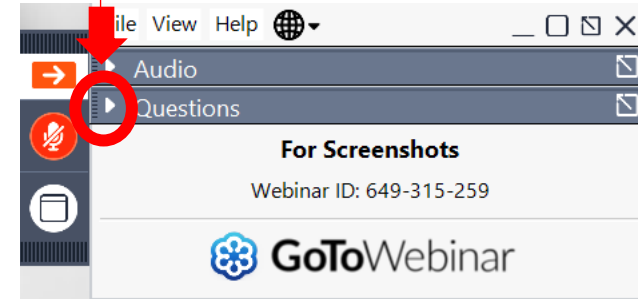
§ We will share the questions with our guest speaker who will respond to the group

## THANK YOU!



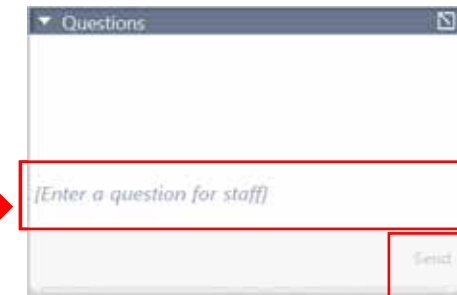
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## **WPI is Wisconsin's APEX ACCELERATOR**

The APEX Accelerators program, under management of the Department of Defense (DOD) Office of Small Business Programs (OSBP), plays a critical role in the Department's efforts to identify and engage with a wide range of businesses entering and participating in the defense supply-chain. The program provides the education and training that all businesses need to participate to become capable of participating in DOD and other government contracts.

## **WPI provides services to all of Wisconsin's 72 counties**

- Individual counseling at our offices, client's facility or virtually
- Small group training – webinars and workshops
- Conferences including one on one buyer meetings – Marketplace, The Contracting Academy, Small Business Academy, Wisconsin Federal Contractor Forum, Acquisition Hour, Cyber Fridays, DOD Roadmap series, Government Opportunities Business Conference, End of Year Federal Contractor Update, Annual DOD Contract Management Update, Evening FAR sessions and more.....

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

# WPI OFFICE LOCATIONS

## § MILWAUKEE

§ *Technology Innovation Center*

## § MADISON

§ *FEED Kitchens*

§ *Dane County Latino Chamber of Commerce*

§ *Wisconsin Manufacturing Extension Partnership (WMEP)*

§ *Madison Area Technical College (MATC)*

## § ASHLAND

§ *Ashland Area Development Corporation*

## § CAMP DOUGLAS

§ *Juneau County Economic Development Corporation (JCEDC)*

## § EAU CLAIRE

§ *Western Dairyland*

## § FOND DU LAC

§ *Envision Greater Fond du Lac*

## § GREEN BAY

§ *NWTC Startup Hub*

## § LACROSSE

§ *Veterans in Professions*

## § MANITOWOC

§ *Progress Lakeshore*

## § OSHKOSH

§ *Greater Oshkosh Economic Development Corporation*

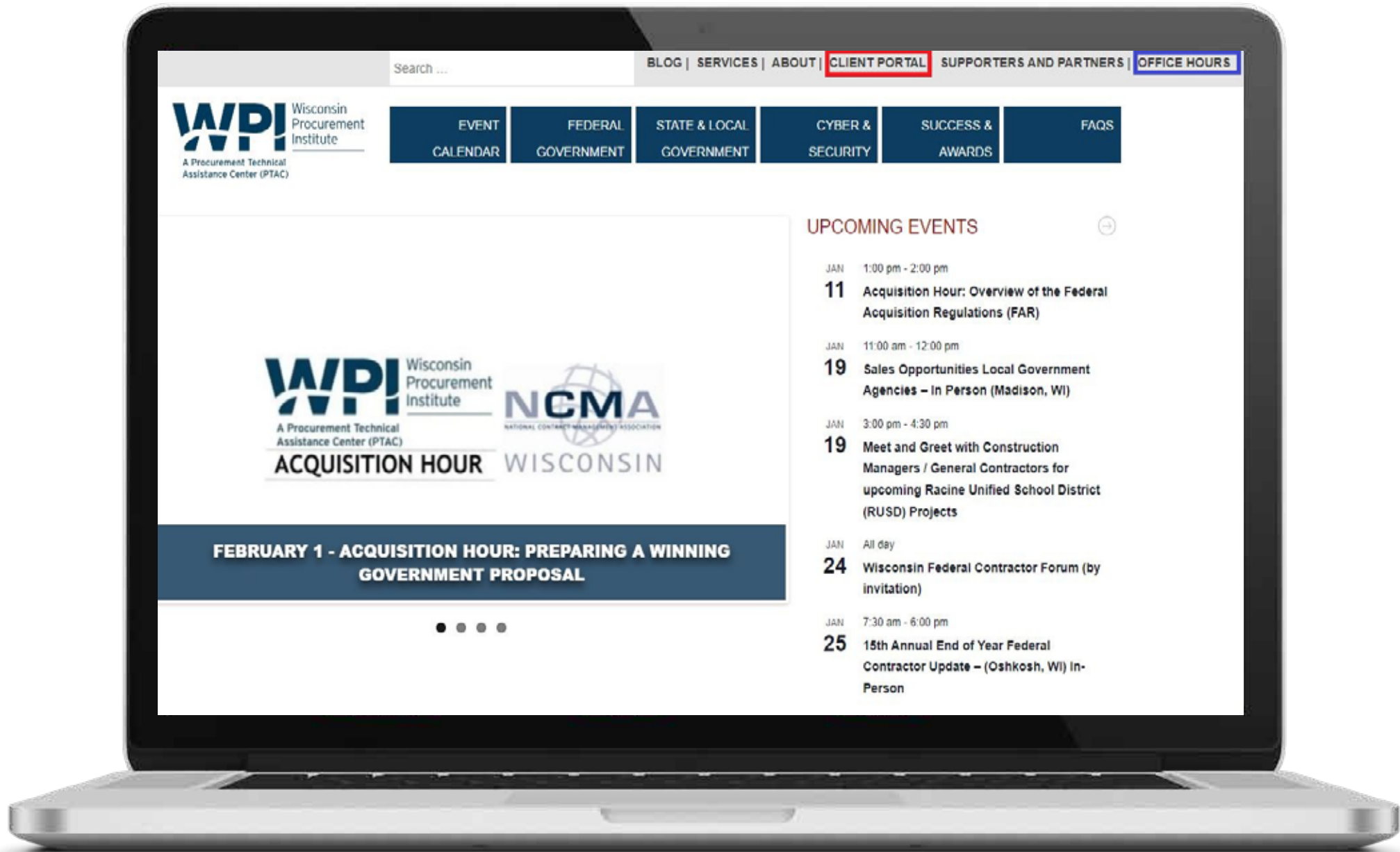
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§ *Small Business Dev Center;  
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**FEBRUARY 1 - ACQUISITION HOUR: PREPARING A WINNING GOVERNMENT PROPOSAL**



### UPCOMING EVENTS

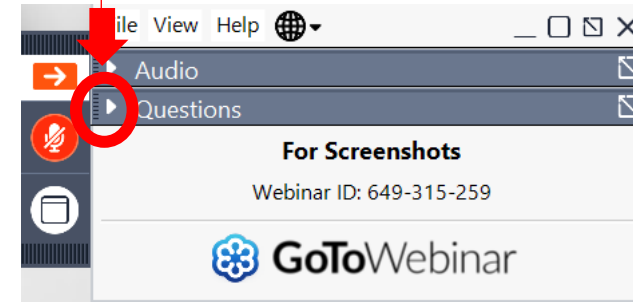
- JAN 1:00 pm - 2:00 pm  
**11 Acquisition Hour: Overview of the Federal Acquisition Regulations (FAR)**
- JAN 11:00 am - 12:00 pm  
**19 Sales Opportunities Local Government Agencies – In Person (Madison, WI)**
- JAN 3:00 pm - 4:30 pm  
**19 Meet and Greet with Construction Managers / General Contractors for upcoming Racine Unified School District (RUSD) Projects**
- JAN All day  
**24 Wisconsin Federal Contractor Forum (by invitation)**
- JAN 7:30 am - 6:00 pm  
**25 15th Annual End of Year Federal Contractor Update – (Oshkosh, WI) In-Person**

# QUESTIONS?



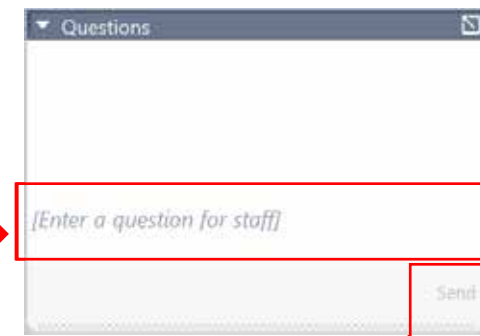
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# UPCOMING TRAINING - EVENTS

# ACQUISITION HOUR LIVE WEBINAR SERIES

- November 8  
**Preparing for One-on-One Buyer Meetings**
- November 15  
**Preparing a Winning Government Proposal**
- November 29  
**Service Contracts with Federal Agencies**
- December 12  
**The HUBZone Program – Certification Benefits and Regulations**

**...More information and registrations at [wispro.org/events](https://wispro.org/events)**

# GOVERNMENT CERTIFICATION WORKSHOPS

- October 12  
**Federal Certifications**
- October 26  
**Local Certifications**
- November 30  
**State Certifications**



MATC Goodman-South Campus  
2429 Perry Street, Madison, WI 53713

**...More information and registrations at [wispro.org/events](https://wispro.org/events)**

*Registration Now Open*



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# December 5-7, 2023

*[MarketplaceWisconsin.com](https://MarketplaceWisconsin.com)*

October 18, 2023

# SURVEY



# CONTINUING PROFESSIONAL EDUCATION



This webinar is eligible for 1 CPE credit.  
For a certificate of this credit please contact:

**Jack Laufenberg**

[jackl@wispro.org](mailto:jackl@wispro.org)

# PRESENTED BY

Wisconsin Procurement Institute (WPI)

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

# Ben Blanc

Wisconsin Procurement Institute

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10437 Innovation Drive Suite 320  
Milwaukee WI 53226



U.S. Small Business  
Administration

# Service Disabled Veteran Owned Small Business

*Shane Mahaffy*

*Lead Business Opportunity Specialist*

# Set-Aside for Certification Programs and Socio-Economic Categories

Targeted set-asides and acquisition goals:

Women-Owned Small Businesses  
(5%)

Small Disadvantaged Businesses  
(including 8(a) certified) (12%)

HUBZone Businesses (3%)

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



Set-asides are reserved for small business between \$10,000 (Micro-purchase Threshold) to \$250,000 (Simplified Acquisition Threshold)

# Wisconsin FY22 Small Business Contract Numbers



WI small businesses received in excess of \$1.027 Billion with the U.S. Government

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Service-Disabled Veteran Owned Small Business received over \$124 Million

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# Service-Disabled Veteran-Owned Small Business Program (SDVOSB)

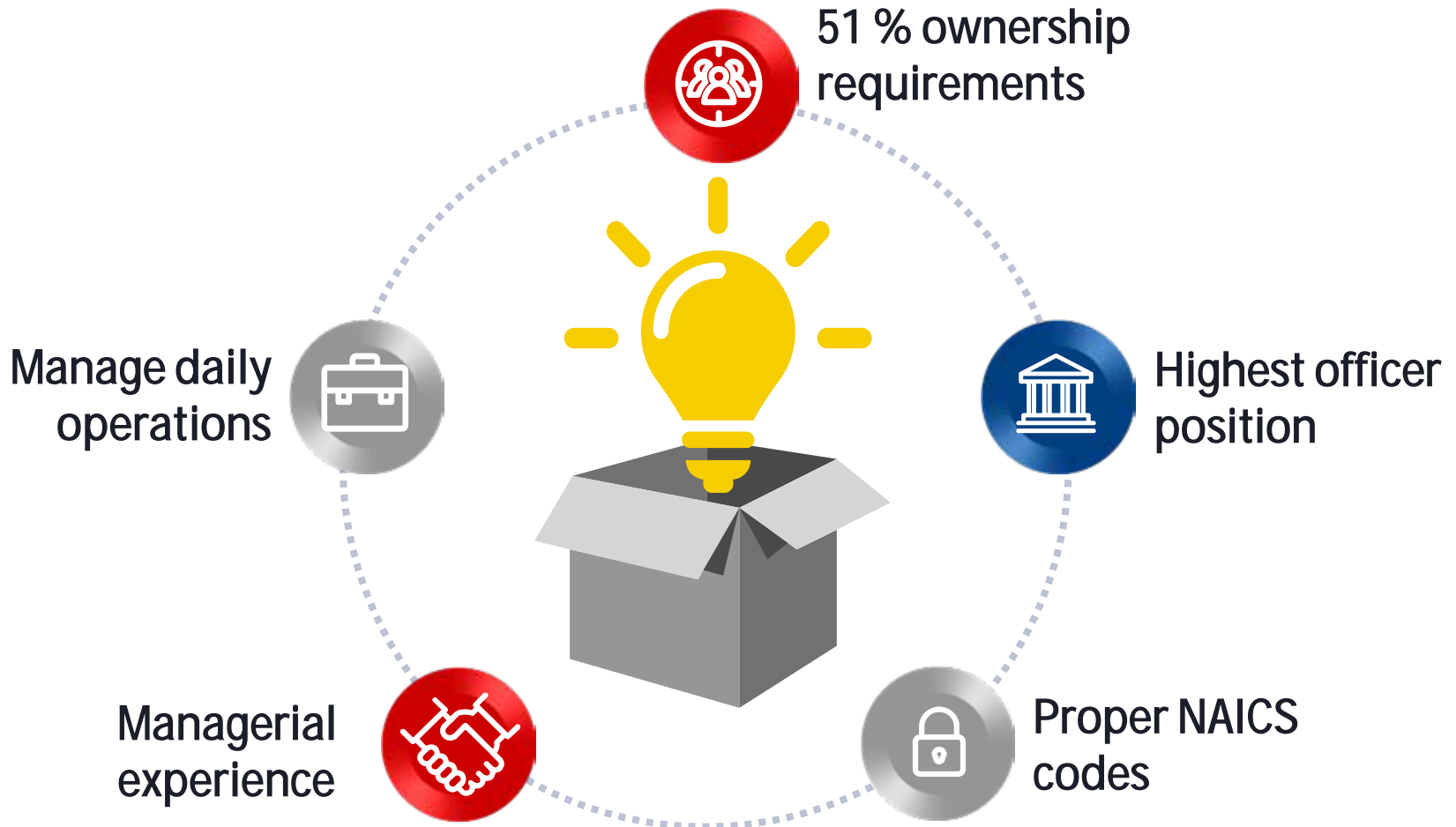


Qualify for set-aside opportunities

Build capacity and grow

Establish joint ventures

# Is the SDVOSB Certification Appropriate for You?



# SDVOSB and VOSB Federal Contracting



Self Certified SDVOSB concerns may qualify for set-aside or sole source contract awards

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There are development opportunities and growth potential by establishing Joint Ventures or a SBA Mentor-Protégé Agreement

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To do business with the VA and the Federal Aviation Administration, Service Disabled and Veteran Owned Small Business Concerns must first be certified through the Center for Verification and Evaluation (CVE) now SBA

# SDVOSB/VOSB Certification Changes

- Ø The Department of Veterans Affairs' (VA) Center for Verification and Evaluation (CVE) Transfer to the U.S. Small Business Administration (SBA).
- Ø In order to streamline this process with all other small business certification programs, the National Defense Authorization Act (NDAA) of 2021 officially requested that CVE's responsibilities be transferred to the SBA by January 1, 2023.
- Ø VOSBs or SDVOSBs previously verified by the VA, will not lose their status at the time of program transfer.

# SDVOSB/VOSB Certification Changes

- Ø **Self-certified SDVOSBs** will now be required to apply for SBA verification. Starting January 1, 2023, there will be a **one-year grace period** to apply with the SBA.
- Ø During the grace period, the company can continue to use its self-certification **for non-VA contracts** until an SBA determination is made.

# Surplus Personal Property for Veteran-Owned Small Business Programs

- Ø Veteran-owned small businesses can access federally owned personal property no longer in use through the General Services Administration's (GSA) Federal Surplus Personal Property Donation Program.
- Ø GSA oversees the reuse and donation of federal personal property. It also:
  - Manages [GSAXcess.gov](https://GSAXcess.gov)
  - Allocates property to the states for donation
  - Reviews [State Agency for Surplus Property \(SASP\)](#) operations

# Surplus Personal Property for Veteran-Owned Small Business Programs

ØSASP manages surplus property disbursement, including:

- Verification of eligibility
- Program compliance
- Fee collection
- Recordkeeping
- Dispute resolution (in accordance with respective states' operating plans)

# *SBA Mentor-Protégé Program*

# Mentor-Protégé Program Overview

As of November 16, 2020, the 8(a) Mentor-Protégé program and the All-Small Mentor-Protégé program have merged into one **SBA Mentor-Protégé Program (MPP)**.

Both programs helped eligible small businesses gain capacity and win government contracts through partnerships with more experienced companies (mentors).



# Program Purpose



Enhance the capabilities of the protégé



Help the protégé meet its business development and contracting goals



Improve the protégé's ability to compete for contracts

# Program Benefits for Protégés and Mentors



A **protégé** can get valuable assistance from a mentor in several areas, including:

- Technical and/or management assistance
- Financing in the form of equity investments and/or loans
- International trade
- Government contracting

A **mentor** benefits in several areas, including:

- Forming a joint venture with its protegee, provided the protégé qualifies as small for that particular federal contract or subcontract
- Contract evaluation preferences where the mentor will subcontract significant work to its protégé, if authorized by the agency

SBA recently updated its regulations to allow small business partners to a JV to use past performance ratings for work previously completed under a JV (and for work performed as a 1<sup>st</sup>-tier subcontractor)

# Learn More

This is **not a matchmaking program**.  
The mentor and protégé should already have found each other before applying.

**You must be approved by the SBA** to participate in the MPP.

Visit our website:

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

Email for general questions:

[sbampp@sba.gov](mailto:sbampp@sba.gov)



U.S. Small Business  
Administration

# How are we doing?

Please take a minute to let us know

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



# SBA - Wisconsin Offices

## Wisconsin District Office

310 West Wisconsin Ave.

Suite 580W

Milwaukee, WI

## Wisconsin District Office

740 Regent Street

Suite 100

Madison, WI

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

Wisconsin District Office Newsletter:  
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For Questions, Email:  
[Wisconsin@sba.gov](mailto:Wisconsin@sba.gov)

# STATE OF WISCONSIN DISABLED VETERAN BUSINESS

# DISABLED VETERAN BUSINESS

The State of Wisconsin through its Supplier Diversity Program offers a Disabled Veteran Business certification

<https://supplierdiversity.wi.gov/Pages/Home.aspx>



# State of Wisconsin Supplier Diversity Program



[ABOUT US](#)

[MBE](#)

[DVB](#)

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## WI Supplier Diversity Program

The Wisconsin Supplier Diversity Program (SDP) certifies Minority-Owned (MBE), Service-Disabled Veteran-Owned (DVB) and Woman-Owned (WBE) businesses to provide better opportunity for them to do business with the State of Wisconsin and to assist the State of Wisconsin in achieving its goal of purchasing 5% with MBEs and 1% with DVBs. The SDP verifies that businesses are at least 51% owned, managed, and controlled by a member or members of selected population. WI certified MBE and DVB businesses may receive a permissive 5% bid preference when they bid on state contracts.

[Apply for Certification](#)



[Login to SDP Portal](#)



[Search Certified Database](#)



# DISABLED VETERAN BUSINESS

## Requirement

At least 51% owned, controlled, and actively managed by an identified service-disabled veteran and serve a useful business function.

The service-disabled veteran owner has demonstrated that they:

- 1) Have a certificate of release or discharge from active duty (Form DD214);
- 2) Reside in Wisconsin; and
- 3) Have a disability rating of at least 0% with the Department of Veteran's Affairs or an Armed Services Branch.

# DISABLED VETERAN BUSINESS

Process:

Go to: <https://supplierdiversity.wi.gov/Pages/DVB/ApplicationProcess.aspx>

1) Create a Login in: <https://wisdp.wi.gov/Login.aspx>

2) Gather the required documentation:

<https://supplierdiversity.wi.gov/PublishingImages/Pages/DVB/ApplicationProcess/DVB%20Checklist.pdf>

3) Complete the online application and upload the documents

4) Do not forget to mail your \$150.00 Fee

# DISABLED VETERAN BUSINESS

Process:

Go to: <https://supplierdiversity.wi.gov/Pages/DVB/ApplicationProcess.aspx>

1) Create a Login in: <https://wisdp.wi.gov/Login.aspx>

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3) Complete the online application and upload the documents

4) Do not forget to mail your \$150.00 Fee

# DISABLED VETERAN BUSINESS

Length: 3 years

Although the DVB Certification Period is for three years, DVB firms must complete an Annual Update each year and Recertify every three years to keep their DVB Certification Active

Cost: \$150.00

Benefits

- 5% bid preference to DVB bidding on State Solicitations
- 1% participation goal for DVB for General Procurement (Not set aside)
- Listed in a Database of Certified Suppliers

# DISABLED VETERAN BUSINESS

Effective July 7, 2021 a logo is available to businesses who are certified as Service-Disabled Veteran-Owned Businesses (DVBs) with the Wisconsin Supplier Diversity Program.

To begin using the logo, certified DVBs must do the following:

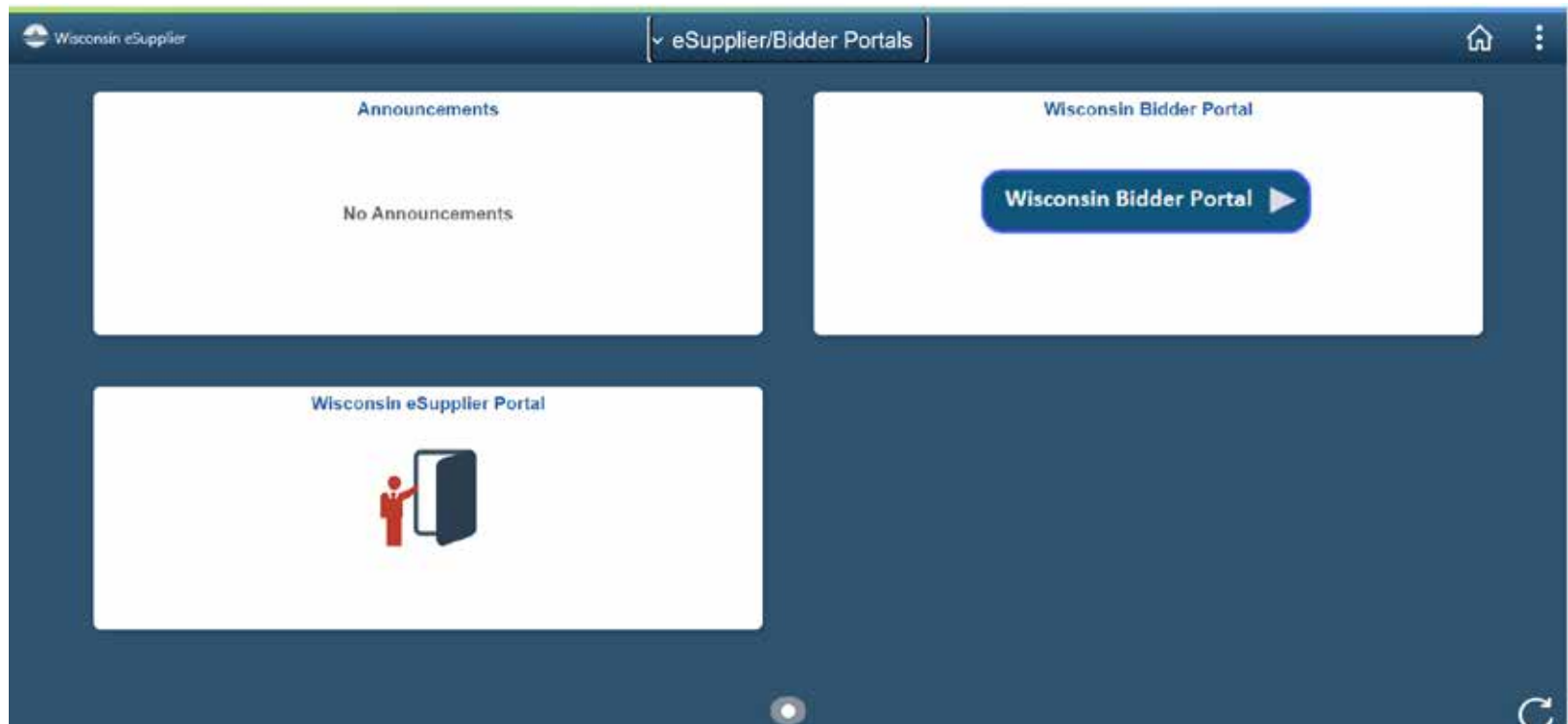
- 1) Review and complete the DVB Logo Use Agreement
- 2) Upload the **completed and signed** DVB Logo Use Agreement to your business account in the Wisconsin Supplier Diversity Program Portal using the "Upload Documents" tab.

Once the above 2 items are completed, certified DVBs may begin using the Wisconsin Trademarked DVB Logo according to the parameters set forth in the DVB Logo Style Guide.

<https://supplierdiversity.wi.gov/Pages/DVB/DVBLogo.aspx>

# REGISTER TO DO BUSINESS

<https://esupplier.wi.gov/>



# WISCONSIN DEPARTMENT OF VETERAN AFFAIRS: WISCONSIN VETERAN OWNED

# WISCONSIN VETERAN OWNED

This is not a certification that allows for set aside or specific goals but the the WDVA makes available a logo for certified veteran-owned businesses operating in Wisconsin.

<https://dva.wi.gov/Pages/benefitsClaims/VeteranOwnedBusiness.aspx>

- Must have less than \$1.5M in gross revenue in the last fiscal year
- Must be owned 51% by one or more Veterans

There is a form to complete and to return to the WDVA to obtain the logo

The business is also included in a [searchable list](#) of Wisconsin's Veteran Owned Businesses.



# DOD MENTOR PROTÉGÉ PROGRAM

# DOD MENTOR PROTÉGÉ PROGRAM

The Department of Defense MPP, is agency-specific and its primary focus is on small businesses performing subcontracts and as suppliers on federal contracts, not upon small businesses performing federal contracts.

As of now: the National Defense Authorization Act for FY2020, extended the DoD Mentor-Protégé Program's authorization through FY2024 for the formation of new agreements and FY2026 for the reimbursement of incurred costs under existing agreements.

# DOD MENTOR PROTÉGÉ PROGRAM

## Eligibility:

A small business must have **less than half the size standard** corresponding to its primary NAICS code, must not be owned or managed by individuals or entities that directly or indirectly have stock options or convertible securities in the mentor firm and must be:

- (A) a small business concern owned and controlled by socially and economically disadvantaged individuals;
- (B) a business entity owned and controlled by an Indian tribe;
- (C) a business entity owned and controlled by a Native Hawaiian Organization;
- (D) a qualified organization employing severely disabled individuals;
- (E) a small business concern owned and controlled by women;

# DOD MENTOR PROTÉGÉ PROGRAM

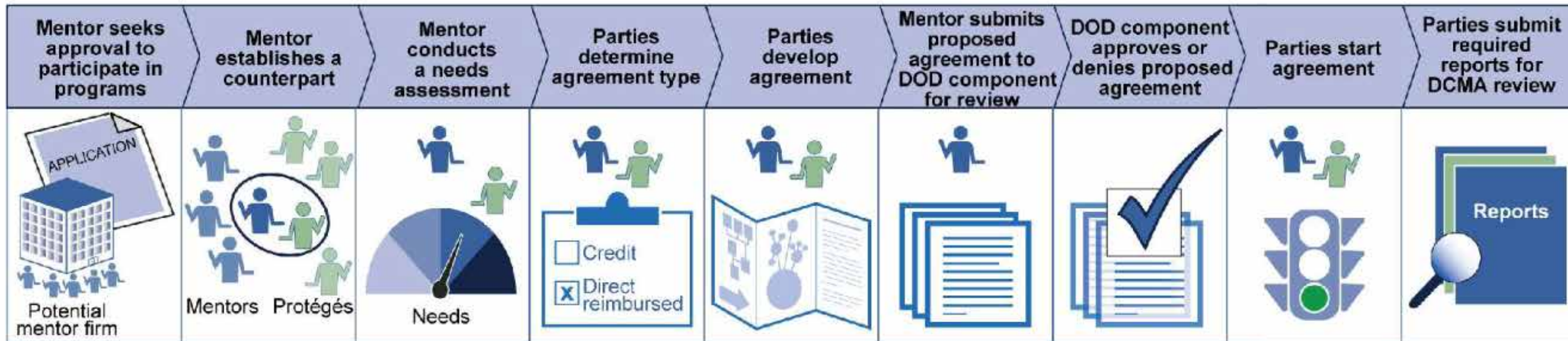
## Eligibility:

A small business must have **less than half the size standard** corresponding to its primary NAICS code, must not be owned or managed by individuals or entities that directly or indirectly have stock options or convertible securities in the mentor firm and must be:

- (F) a small business concern owned and controlled by service-disabled veterans;
- (G) a qualified HUBZone small business concern; or
- (H) a small business concern that —
  - (i) is a nontraditional defense contractor; or
  - (ii) currently provides goods or services in the private sector that are critical to enhancing the capabilities of the defense supplier base and fulfilling key Department of Defense needs

# DOD MENTOR PROTÉGÉ PROGRAM

How to participate:



DCMA Defense Contract Management Agency  
DOD Department of Defense

Source: GAO analysis of Department of Defense Pilot Mentor-Protégé Program policies and procedures. | GAO-17-172

# DOD MENTOR PROTÉGÉ PROGRAM

How to participate:

## Step 1: Mentor seeks approval to participate in Program

A firm that is interested in participating in the MPP must apply for approval as a mentor (Show non affiliation and qualifications to support the Protégé)

## Step 2: Establish a Counterpart

Mentors and Protégés are solely responsible for finding their counterpart.

A Mentor firm must

- currently performing under at least one active approved subcontracting plan negotiated with DoD or another Federal agency
- and be currently eligible for the award of Federal contracts.

New Mentor Applications must be approved and may be submitted to and approved by the Office of Small Business Program (OSBP) of the cognizant Military Service or Defense Agency or to the DoD OSBP office prior to the submission of an Agreement.

# DOD MENTOR PROTÉGÉ PROGRAM

How to participate:

## Step 2: Establish a Counterpart

Mentors and Protégés are solely responsible for finding their counterpart.

A Protégé firm must be either a small disadvantaged business (SDB), a qualifying organization employing the severely disabled, a women-owned small business (WOSB), a service-disabled veteran-owned small business (SDVOSB), or located in a historically underutilized business zone (HUBZone).

# DOD MENTOR PROTÉGÉ PROGRAM

How to participate:

## Step 3: Mentor conduct a needs assessment

the mentor conducts a preliminary assessment of the protégé's developmental needs. The mentor and protégé then mutually agree on the developmental assistance that the mentor is to provide to address those needs

## Step 4: Determine the Type of Agreement

### Direct Reimbursed

Directly reimbursed agreements are those in which a mentor receives reimbursement for allowable costs of developmental assistance provided to a protégé.

### Credit

Credit agreements are those in which a mentor receives a multiple of credit toward their Small Disadvantaged Business (SDB) subcontracting goal based on the cost of developmental assistance provided to a protégé.

Hybrid, which provide credits for the first year of the agreement and then can be modified to include monetary reimbursements in the remaining years.

# DOD MENTOR PROTÉGÉ PROGRAM

How to participate:

## Step 5: Develop Agreement

The mentor and protégé develop a proposed MPA that must address a number of required elements. Developmental assistance should align with the protégé's strategic vision.

*(a) Assistance by mentor firm personnel in —*

*(i) General Business Management/Corporate Infrastructure: (See example list below)*

- *Organizational Planning Management*
  - *Strategic planning, business planning, legal/risk management, proposal development*
- *Business Development/Marketing/Sales*
  - *Market research, product forecasting, web-based marketing, e-commerce*
- *Human Resource Management*
- *Financial Management*
- *Contract Management*
- *Facilities and Plant Management – security, health & safety, OSHA standards*

# DOD MENTOR PROTÉGÉ PROGRAM

How to participate:

## Step 6: Submit Agreement Proposal

Directly reimbursed agreement applications should be submitted to the defense agency's Office of Small Business Programs (OSBP). Credit agreements should be submitted to the Defense Contract Management Agency (DCMA). (See resources links for example of Agreement)

## Step 7: DOD Component approved the agreement

# DOD MENTOR PROTÉGÉ PROGRAM

How to participate:

## **Step 8: Start Agreement**

Credit agreements start on the date they are approved. Directly reimbursed agreements start on the date funds are obligated to the contract.

## **Step 9: Reporting and DCMA Review Requirements**

Mentors: submit a Semi-annual and an annual reports, and have an annual DCMA performance review

Protégé: submit an annual report and a two-year-out reports (after the MPP has concluded)

DCMA annual performance reviews are a major factor in determining the amount of reimbursement a mentor is eligible to receive in the remaining years of directly reimbursed agreements.

# DOD MENTOR PROTÉGÉ PROGRAM

## Resources

DOD MPP Contact: [dodmpp@osd.mil](mailto:dodmpp@osd.mil) (Detailed MPP briefings are available by appointment)

<https://business.defense.gov/Programs/Mentor-Protege-Program/>

<https://business.defense.gov/Programs/Mentor-Protege-Program/Contacts/>

<https://business.defense.gov/Programs/Mentor-Protege-Program/MPP-Resources/>

[https://dbb.defense.gov/Portals/35/Documents/Reports/2022/DBB%20FY22-01%20MPP%20Assessment%20Final%20Report%20w\\_Cover%20-%20Cleared.pdf](https://dbb.defense.gov/Portals/35/Documents/Reports/2022/DBB%20FY22-01%20MPP%20Assessment%20Final%20Report%20w_Cover%20-%20Cleared.pdf)

<https://www.gao.gov/assets/720/717090.pdf>