



CERTIFICATION 101

Presented by the Office of Equal Business Opportunity



PALM BEACH COUNTY
*Discover the Palm Beaches...
the Best of Everything*

EBO Program Ordinance

Small businesses wishing to participate in Palm Beach County's contracting opportunities in the areas of Commodities, Construction, and Professional Services may apply for small business certification. Certification is granted for up to three (3) years, except in accordance with the graduation and suspension provision found in the EBO Ordinance (Sec. 2-80.21). Palm Beach County utilizes the National Institute of Government Procurement (NIGP) commodity codes to classify vendors according to the services and products they provide.

Benefits of Certification

- Palm Beach County now has a minimum mandatory goal of 20% SBE participation for county contracts.
- All certified S/M/WBEs are listed in OEBO's online directory that is updated daily for maximum exposure.
- Additional points can be awarded to S/M/WBE Primes when responding to Request for Proposals.
- Other local government agencies accept PBC certification to achieve vendor diversity
- An Affirmative Procurement Initiative (API) plan is designed to encourage equitable utilization and greater participation of certified S/M/WBE businesses

Affirmative Procurement Initiatives (API)

- Palm Beach County now has a minimum mandatory goal of 20% SBE Participation for County Contracts
- SBE Price Preference
- Evaluation Preference
- Evaluation Preference for New SBE Primes
- Vendor Rotation (Prequalified Panel of SBE Vendors)
- Joint Ventures, Mentor/Protégé
- Goals for Minority and/or Women Businesses
- Bond Waiver for Construction Contracts less than \$200,000
- Informal (<\$100,000) & Formal (\$100,000 >) Procurements

Certification Eligibility

- Your business must be registered with the State of Florida (www.sunbiz.org) as a “FOR-PROFIT” business, and domiciled in Palm Beach County.
- Your business must have a “Significant Business Presence” in Palm Beach County.
- Your business must be independently owned and operated.
- Minority and/or Women owned businesses must be at least 51% owned, managed, and controlled by one or more minority group and/or woman, that is ready, willing, and able to provide the goods and/or services to PBC

Certification Eligibility (continued)

- Your business and any subsidiaries or affiliates must meet the size standard for small S/M/WBEs based on gross receipts averaged over a three (3) year period and must not exceed the following:
 - Construction - must not exceed \$9 million
 - Goods - must not exceed \$5 million
 - Professional Services (CCNA Required) - must not exceed \$5 million
 - Professional Services (Non-CCNA) - must not exceed \$4 million
 - Other Services - must not exceed \$4 million

Getting Started



- In order to do business with Palm Beach County, all vendors are required to register on the Vendor Self-Service System (VSS)
- Go to pbcgov.org/OEBO, click Programs, click, Certification Program, you can either choose Vendor Online Certification, print an application, or stop by our office and pick up an application.
- Certification is now FREE OF CHARGE.

Getting Started (continued)

- If you do not want your financial information to be made public, notify OEBO staff to schedule an appointment to have your information reviewed.
- When submitting your application in person, you must also submit a notarized affidavit as part of the application.
- OEBO staff will notarize the affidavit for you at no charge.

What documents do I need to provide?

- Municipal Business Tax Receipt(s) and Palm Beach County Business Tax Receipt(s) when applicable.
- Copy of Professional License(s) (SOF) or Certificate of Competency (Construction Trade).
- Fictitious Name Certificate, if applicable.
- Federal tax returns (and request for extensions) filed by the firm with related Schedules, for the past three years.
- Federal Tax returns (and request for extensions) for Subsidiaries and/or Affiliates, including all schedules, if applicable.
- Proof of Capital Investment (identify investors, types of contributions and amounts).

What Documents (continued)

- For firms in business less than one year, submit opening balance sheet and income statements for months in business.
- Copies of resume for owners/directors may be requested.
- Copy of current executed lease agreement and any addendums or Property Tax Bill (Home office).
- Current list of employee(s) with date of employment/hire and position/title for both full & part-time.
- Current Reemployment tax form RT-6 or tax form 941.
- Copies of 1099 for independent contracted employees, if applicable.
- Largest contract to date, to include the date of the project, the owner of the contract and service rendered.

What Documents (continued)

- Provide copies of your insurance and/or bonding to include agent/company and capacity/coverage amount, if applicable.
- Provide a list of all equipment used to provide the services indicated in your commodity list.
- Copies of three current customer invoices, signed contracts, or proposals to include date, owner, and service rendered.
- For a provider of Consultants' Competitive Negotiations Act (CCNA) Professional Services, submit a copy of your CCNA certification, or call the PBC Dept. of Engineering at (561) 684-4000

Documents Needed For Various Corporate Structures

Corporations

- Articles of Incorporation, including date approved by State Department of Corporations, and any subsequent amendments
- Corporate By-Laws
- List of shareholders, copy of issued stock certificates (front and back); copy of stock ledger; and proof of stock purchase
- List of Officers and Board of Directors

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- Operating Agreement
- Membership Units
- Ledger

Corporate Structures Documents (continued)

Partnership

- Partnership Agreement

Franchise

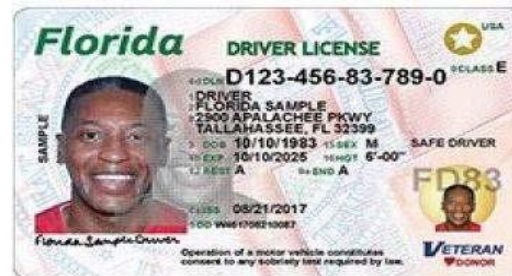
- Franchise Agreement

Sole Proprietorship

- Most recent three years personal federal tax returns including Schedule C

Additional Documentation Needed for Minority and Women Business Enterprises

- Proof of gender and/or ethnicity
- Examples of documents that can be used to provide proof of gender and/or ethnicity are:
 - Driver's License
 - Passport
 - Birth Certificate



Certification Process



- OEBO has up to ninety (90) business days after all required documents have been received to complete your certification. Failure to submit all information requested will delay the processing.
- You may request an Expedited Review if you are submitting a Request for Quote (RFQ), Invitation for Bid (IFB) or Request for Proposal (RFP) to Palm Beach County.
- The Expedited Review request must be submitted twenty (20) business days prior to bid opening or proposal due date to be considered. There is a fee of \$300.00 for expedited processing.

Is the Certification process reciprocal with other agencies?

- There is NO RECIPROCALITY in our certification process, however...
- Palm Beach County, The City of West Palm Beach, and the School District of Palm Beach County share an Inter-local Agreement to reduce time and paperwork for businesses who wish to become certified with these agencies.
 - Once your business becomes certified as an S/M/WBE with Palm Beach County OEBO, you can request an inter-local coversheet to submit along with your separate application to the entities listed above.
 - Each entity has their own application process

What's Next After Certification?

MARKET YOUR CERTIFICATION

- Attend tradeshows such as Business Matchmaker, join local Chambers to network and market your business, and pass out your business cards.
- Participate in outreach activities of local agencies.
- Always check your email for notifications from PBC Purchasing for RFQ's, Bid's and RFP's, informing you of bid opportunities on the PBC Purchasing website. Also, check the [PBC Business Opportunities link](#) for all solicitations. This also on the OEBO website.



BUSINESS
opportunities

Market your Certification (continued)

- You can also use OEBO's website to locate other S/M/WBE's by clicking on the Vendor Directory tab.
- Use the internet to check other websites of local, state, and federal agencies for opportunities.
- Check publications such as Florida Trend, Fortune, and Bloomberg for information and opportunities.
- Come visit PBC OEBO and request a one-on-one session to better understand the bidding process, including terms and conditions.

Education & Support

- Your OEBO Business Specialist is here to answer questions and help resolve issues that sometimes occur.
- Take advantage of educational opportunities through our partners such as Small Business Development Center (SBDC), TED Center, and SCORE. They can provide assistance with business plans and bid writing.
- Find a mentor. OEBO staff may have some suggestions, if you need assistance.

Contact Information

- **PBC Office of Equal Business Opportunity - S/M/WBE Certification**
50 South Military Trail, Suite 202
(561) 616-6840 www.pbcgov.org/oebo
- **PBC Purchasing Department - Registration, Business Opportunities,**
50 South Military Trail, Suite 110
(561) 616-6800 www.pbcgov.org/purchasing
- **PBC Engineering and Public Works Department - CCNA**
Certification, 2300 N. Jog Road, Suite 3W-33
(561) 684-4150 www.pbcgov.org/engineering/roadwayproduction

Other Partners

- City of Riviera Beach (561) 845-4883 or www.rivierabch.com/smallbusiness
- City of West Palm Beach (561) 822-2103 or www.wpb.org/Departments/Procurement/SmallBusiness
- School District of Palm Beach County (561) 681-2412 or www.palmbeachschools.org/diversityinbusiness
- SCORE (561) 833-1672 or www.score.org
- Small Business Development Center (954) 762-5129 or www.sbdc.fau.edu
- The TED Center (561) 265-3790 or www.tedcenter.org
- Solid Waste Authority of Palm Beach County (561) 640- 4000 ext.4529 or www.swa.org/279/Purchasing-Bids