

# GOVCON GUIDEBOOK

## **How to Build & Qualify Your Start-Up for Government Contracts**

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Whether you're curious about starting your entrepreneurial journey, diving into government contracting, exploring partnership possibilities, or seeking marketing assistance, I'm here to help. Your questions and ideas are welcome—drop me a line at <a href="mailto:ariel@wildmonkeybrand.com">ariel@wildmonkeybrand.com</a> , and let's start a conversation!	
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# DISCLAIMER

This book is intended for informational purposes only and should not be considered a substitute for legal or financial advice. The suggestions and strategies it offers are meant to provide guidance and should not be seen as guarantees of success. The guidebook aims to help readers set up their businesses to qualify for government contracting opportunities, but winning a contract is not guaranteed.

It is important not to rely solely on the content of this book when making legal, financial, or other significant decisions. The authors and publishers disclaim any liability for the use of the information provided. Always seek the advice of qualified professionals for legal or financial matters.

Additionally, remember that the steps outlined for starting a business in this book should be supplemented by consulting with a professional tax consultant, accountant, or attorney to ensure that all legal requirements are met before launching your business.



# INTRODUCTION

I'm Ariel Aaron Davis, and throughout my life, I've embraced the label of "nerd." As a passionate academic, I love learning new things, and it becomes even more rewarding when what I've learned can lead to other's financial success. This motivation drove me to establish my company, A Squared Holdings—the culmination of my professional journey and entrepreneurial expertise, which I now offer to clients through a range of products and services.

The core purpose of our offerings is to facilitate a smoother and faster transition from being an employee to becoming a successful business owner. Entrepreneurship poses various challenges, such as analysis paralysis, imposter syndrome, and a lack of resources. These are the barriers I aim to help individuals overcome. My company provides the means to sidestep these pitfalls while acquiring the necessary knowledge and tools.

This guidebook is an accumulation of the invaluable lessons I wish I'd know sooner while navigating the business development and government contracting space. It's a product of continuous refinement, reflecting my evolving insights. Whenever I uncover a new business insight, I record it here. If I later discover a better approach or an enhanced method, I refine my notes accordingly. This guidebook is a compilation of those notes, business strategies and refined insights that I still build upon daily, incorporating every new lesson.

Because I love learning, I've read a lot of books from various sources. I believe learning can happen anywhere and from any experience or person. However, I've found that some authors capitalize on the public's general lack of knowledge and access to resources. While their books contain valuable nuggets, there's often a lot of fluff. I didn't want to write another fluffy book. My goal is for you to be able to use this guidebook to make money. Period.

I'm sharing this guidebook with you to lighten your load on your path to greatness. You don't have to exert excessive effort; the knowledge I've gathered are here to empower you and make your journey smoother. I once helped a group of my high school classmates cheat on a test. Years later, when I ran into them, they told me they would not have graduated if I hadn't slid my answers under the desk. I'm still that same person, driven to help others succeed.

This guidebook is my way of sliding the answers under your desk so you can graduate to your dream state in life.

So, let's get started!

**"DO YOUR LITTLE BIT OF  
GOOD WHERE YOU ARE; IT'S  
THOSE LITTLE BITS OF GOOD  
PUT TOGETHER THAT  
OVERWHELM THE WORLD."  
—DESMOND TUTU**

# **PREP WORK: GATHERING THE TOOLS, SUPPLIES & INFORMATION YOU'LL NEED TO GET STARTED**

Starting a business can be a significant step, particularly when you aim to become a government contractor. A government contractor is a private company—often a small business—that provides products or services to government agencies. This could involve fulfilling contracts for everything from office supplies to construction services for federal, state, or local government entities.

To become a government contractor, your business must meet specific eligibility criteria, abide by certain regulations, and often compete through a bidding process to secure contracts. Establishing a business with the intent to contract with the government requires careful preparation and a clear understanding of the requirements and processes involved.

However, becoming a government contractor is not as challenging as it may seem. This guide will take you through the process of setting up a business in Texas to begin pursuing government contracts. We will outline the steps to make your business eligible for government contracts, which can be a valuable revenue source for small businesses.

## **WHY START A BUSINESS IN TEXAS**

Texas is a strategic choice for starting a business. The state boasts a skilled workforce and does not impose income tax on businesses or their owners, leading to potential cost savings. Texas also fosters innovation and entrepreneurship, making it a welcoming environment for new ventures. Launching your business in Texas can give you a strong foundation for success.




## **WHY BECOME A GOVERNMENT CONTRACTOR**

For small businesses, becoming a government contractor can be a strategic decision, considering that the U.S. government is the largest buyer globally. It procures a wide range of products and services and is mandated to ensure fair contracting opportunities for small businesses. In 2022, small businesses secured nearly \$163 billion from federal contracts, with \$70 billion allocated to Small Disadvantaged Businesses (SDBs). The consistent increase in government spending on small business contracts over the past few years indicates a growing and potentially lucrative market. Beyond federal contracts, opportunities also exist at the state, local, and educational levels. Venturing into government contracting can provide steady revenue streams, business stability, and growth opportunities.

# GUIDEBOOK CALLOUTS

In this guidebook, you'll find a structured path laid out to help you start a business in Texas with the end goal of obtaining government contracts. To aid you in this endeavor, the book is sprinkled with special callouts—**Milestones**, **Resources**, and **Notes**. These markers act as guideposts to help you make sense of things and pace yourself along the way.

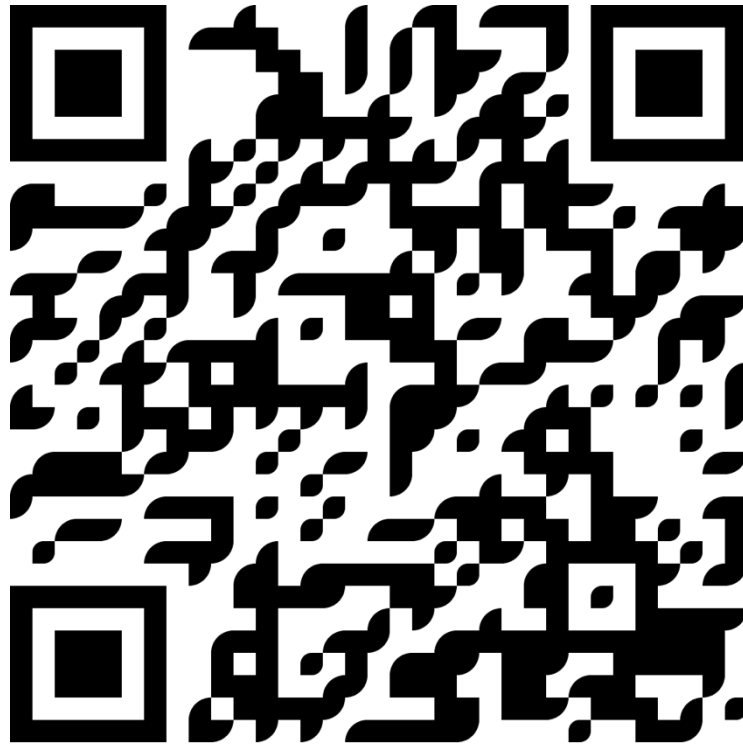
Below, you'll find the guidebook key, which describes each type of callout and their respective identifiers. This key will help you quickly recognize and understand the significance of these callouts as they appear throughout the guide.

GUIDEBOOK CALLOUT	DEFINITION	IDENTIFIER
<b>Milestone</b>	A major accomplishment or a critical step that is essential for progressing in setting up your business for government contracting.	
<b>Resource</b>	Tools, contacts, references, templates, calculators, and other essential aids that support you in reaching milestones and empower you as an entrepreneur.	
<b>Note</b>	Important information, reminders, tips, and words of caution to help you avoid common pitfalls and to keep important details in mind.	

As you progress through the guidebook, keep an eye out for these symbols. They'll highlight key information and tools that are integral to your success. The guidebook is structured so that you can follow the steps in sequence while taking advantage of the milestones, resources, and notes to enhance your understanding and efficiency in starting your business.

## GUIDEBOOK LINKS

For the most current links featured in this guidebook, please visit our website at [wildmonkeybrand.com](https://wildmonkeybrand.com). Alternatively, you can scan the QR code or utilize the link database below to ensure access to the latest resources and information."



<https://swiy.co/GuidebookLinks>

# GETTING ORGANIZED



When starting a legitimate and profitable business, organization is key. There will be a lot of information coming your way once you decide to start a business. You will begin to receive important information and records in the mail, you'll begin to create business accounts from banking to social media and there will be dates that you need to remember for tax filings, reporting, etc.

**We recommend taking the following steps to keep organized:**

- **Purchase a Storage Solution:** Purchase a three-inch binder with dividers to keep your paperwork from the IRS, Secretary of State, DUNSs, SAM.gov, etc. organized. Alternatively, consider purchasing a file cabinet or a file box, with hanging folders and file folders to store your hard copy files.
- **Scan Documents:** Similarly, I recommend scanning your documents and saving them into OneDrive or Google Drive for quick reference and/or backups. I specifically like this approach because, when your files are stored digitally, they are easily searchable, which saves time getting to the information that you need when you need it.
- **Stay Organized:** Whenever you receive paperwork pertaining to your business, file the paperwork away in your binder or a file cabinet.
- **Calendar Reminders:** If you receive notices informing you of due dates, expiration dates, etc. Immediately add them to your calendar
- **Check Emails:** Check your business email regularly, including your junk folders. Sometimes there is money in there.
- **Keep Your Business Address Up to Date:** Notify the Secretary of State, IRS and Comptroller's office of any changes to your address. If the address is not up to date, you may miss out on important notices that traditionally come in the mail which could cause you to miss deadlines and result in fees and even the forfeiture of your business. The process to reinstate is costly and time consuming, it makes certifications difficult, or all your hard work goes down the drain.
- **Password Management:** When setting up a business, especially one that does government contracting, you will need to create multiple accounts across varying systems. Save yourself some time forgetting passwords by developing a system for password management. You can get a free account with LastPass to save your passwords to business related accounts securely.
- **Invest in a Printer:** preferably a laser jet that takes toner, rather than an inkjet. You get way more bang for your buck, especially if you print proposals, handouts, documents, etc. to help you grow your business.
- **Virtual Business Address:** Get a virtual business address. When you register your business, the address that you use becomes accessible to the public in many cases. Just like your LLC protects your personal assets from your business's liabilities, having a business address that is separate from your home address is another degree of separation between your personal life and your business.
  - Not all virtual addresses are created equally. Some agencies and systems reject virtual addresses. You'll want to look for an address where there is a lease, a receptionist and business can be conducted at the address, so PO

Boxes or similar services offered by FedEx will not work. When in doubt, use your home address to get started and change it later. Virtual address that includes mail & phone only are NOT accepted during the registration process for government contracting. but virtual office (mail, phone, lease) is acceptable.

## TOOLS & RESOURCES

Because we are passionate about helping small businesses, we make it a point to regularly be available for digital marketing and advertising questions. Our goal is to be helpful and resourceful whenever possible.

Whether it's during our monthly digital marketing office hours or on a scheduled 1x1, we're always happy to provide assistance as you navigate the twists and turns of the digital landscape.

One of the most frequent questions that we get asked is "which tools should I use?" Technology is constantly changing with new tools entering or adapting to the marketplace all the time. It can be tough to know which tools are right for you and your business. As a rule of thumb, the tools that we recommend must follow some general guidelines before we recommend them to our clients or partners.

- **Is it useful to the bottom line?** – a tool is only as good as it is useful. If it doesn't inch you forward toward increasing leads, sales, or revenue, chances are, it's not the tool for our clients.
- **Is it accessible and easy to use?** – accessibility is in the eye of the end user. If a tool is excessively expensive (ie. It doesn't deliver any value or return on investment) or if it's way too complicated to use, it's probably not a good look for your business. Many small business are short on time and resources, especially when first starting out. We cannot in good conscious recommend a product that doesn't help the client in the time and resource department.
- **Would we use it ourselves at A Squared or Wild Monkey?** – most tools that we recommend have been used by a member of our team in the past or are currently being used in the daily operations at our agency. We can confidently stand by the tools and apps that we recommend to our clients because we're familiar with them and they drive real results.

## THE TOOLS & RESOURCES WE LOVE

With these main guidelines in mind, here are the tools and resources that were helpful to me throughout my entrepreneurial and professional career:

PRODUCT/SERVICE	DESCRIPTION	URL
Small Business Development Center	Offers classes, mentorship, development, and resources to help small businesses grow.	<a href="https://www.sba.gov/local-assistance/find/">https://www.sba.gov/local-assistance/find/</a>
OneDrive & Google Drive	Cloud-based file storage solutions for easy document management and collaboration.	<a href="https://www.microsoft.com/en-us/microsoft-365/onedrive/online-cloud-storage">https://www.microsoft.com/en-us/microsoft-365/onedrive/online-cloud-storage</a>
LastPass	A password management tool to securely store and manage passwords.	<a href="https://www.lastpass.com/">https://www.lastpass.com/</a>
G-Suite	Provides professional business email and productivity tools, avoiding the use of @gmail accounts.	<a href="https://workspace.google.com/">https://workspace.google.com/</a>
WordPress	A popular website builder and content management system for creating websites.	<a href="https://wordpress.org/">https://wordpress.org/</a>
HubSpot	A Client Relationship Manager (CRM) that helps businesses manage relationships with their customers.	<a href="https://www.hubspot.com/">https://www.hubspot.com/</a>
Hover	A platform for domain registration and management.	<a href="https://www.hover.com/">https://www.hover.com/</a>
Stripe	A point-of-sale (POS) system that offers versatility and lower transaction fees.	<a href="https://stripe.com/">https://stripe.com/</a>
Square	An easy-to-use POS system, although it charges slightly higher fees compared to Stripe.	<a href="https://squareup.com/">https://squareup.com/</a>
AppSumo	Offers lifetime deals on various apps to boost productivity, profitability, and business intelligence.	<a href="https://appsumo.com/">https://appsumo.com/</a>
Virtual Address Services	Choose from various virtual address service providers to establish a professional business address.	Various (See note re: Virtual Addresses)
Business Banking	Consider various business banking options such as Truemark Financial, Truist Bank, Key Bank, Univest, PNC, BofA, US Bank.	Various
Business Phone	Options for business phone services, including ringcentral.com, freedomvoice.com, and Microsoft Teams.	<a href="https://www.ringcentral.com/">https://www.ringcentral.com/</a>

Business Credit Monitoring	Monitor your business credit with Nav.com.	<a href="https://www.nav.com/">https://www.nav.com/</a>
GnuCash	An open-source accounting software for small businesses.	<a href="https://www.gnucash.org/">https://www.gnucash.org/</a>
Wave Accounting	A free accounting software designed for small businesses.	<a href="https://www.waveapps.com/">https://www.waveapps.com/</a>
FreshBooks	Accounting and invoicing software for small businesses.	<a href="https://www.freshbooks.com/">https://www.freshbooks.com/</a>
Company Name Generator	Use the Ramp or WordPress Company/Business Name Generator to help brainstorm business names.	<a href="https://ramp.com/company-name-generator/">https://ramp.com/company-name-generator/</a> <a href="https://wordpress.com/business-name-generator/">https://wordpress.com/business-name-generator/</a>
Value Statement Generator	Generate a vision statement for your business using IvyPanda's tool.	<a href="https://ivypanda.com/vision-statement-generator">https://ivypanda.com/vision-statement-generator</a>
SWOT Analysis Generator	Create a SWOT analysis for your business using IvyPanda's tool.	<a href="https://ivypanda.com/swot-analysis-generator">https://ivypanda.com/swot-analysis-generator</a>
GoalSumo	Strategically align your goals with daily productivity using GoalSumo.	<a href="https://goalsumo.com/">https://goalsumo.com/</a>
Simplify	An independent publication offering free guides for small business owners.	<a href="https://www.simplifyllc.com/">https://www.simplifyllc.com/</a>
HubSpot Buyer Persona Generator	Learn what a buyer persona is and how to conduct research, surveys, and interviews to build your own. Create a buyer persona that your entire company can use to market, sell, and serve better.	<a href="http://hubs.to/nDzW7">http://hubs.to/nDzW7</a>
Canva	need graphics but don't want to hire a graphic designer? Here are some things that you can tackle with Canva	<a href="https://www.canva.com/">https://www.canva.com/</a>
Metricool	Keep your social presence active by automatically scheduling posts to keep your audience engaged. This tool is a powerful alternative to Hootsuite, which is more pricey.	<a href="https://metricool.com/">https://metricool.com/</a>
MailChimp	The leading email marketing and automations platform that uses AI to personalize communications, helping to increase opens, clicks, and sales with effective customer journey automations.	<a href="https://mailchimp.com/">https://mailchimp.com/</a>
Planoly	streamlines social media planning across multiple channels, offering features like AI-powered caption writing and video trends to enhance content creation, which can lead to a sixfold growth in their following.	<a href="https://www.planoly.com/">https://www.planoly.com/</a>

Zapier	Connect Your Apps and Automate Workflows. Easy automation for busy people. Zapier moves info between your web apps automatically, so you can focus on your most important work. Over 1,000 apps.	<a href="https://zapier.com/">https://zapier.com/</a>
Rebrandly	Rebrandly is the most complete and reliable management platform for your links. The easiest way to create, measure and share short URLs with a custom domain name	<a href="https://www.rebrandly.com/">https://www.rebrandly.com/</a>
Google Drive	Offers a way to store, share, and collaborate on files from any device securely, integrating with productivity apps and leveraging Google's advanced search and AI to improve teamwork and accelerate project delivery.	<a href="https://drive.google.com/">https://drive.google.com/</a>
Google Forms	Provides a straightforward platform for creating, distributing, and analyzing surveys and forms, allowing for real-time insights and data-driven decision-making with ease of access from any device.	<a href="https://docs.google.com/">https://docs.google.com/</a>
Calendly	simplifies the scheduling process by eliminating back-and-forth emails, enabling instant booking of high-value meetings, and integrating with your current tools to streamline workflows and enhance productivity across various teams.	<a href="https://calendly.com/">https://calendly.com/</a>
Draw.io	top-rated diagramming tool on the Atlassian Marketplace, offering a fast and intuitive way to create a wide range of diagrams and whiteboards directly within Confluence, enhancing team collaboration with best-in-class security.	<a href="https://www.draw.io/">https://www.draw.io/</a>
Storybrand	Clarify your message by creating a BrandScript. Create Marketing Materials that Work, Grow your business. They also have marketing courses and workshops	<a href="https://www.mystorybrand.com/">https://www.mystorybrand.com/</a>
Piktochart	Piktochart is the easy-to-use design tool that helps you tell your story whether it's in the format of a presentation, report, banner, or	<a href="https://piktochart.com/">https://piktochart.com/</a>

	infographic with the visual impact it deserves.	
Slybroadcast	Efficiently send personalized, ringless voicemail messages directly to the voicemail boxes of clients and leads, saving time on calls and ensuring your outreach remains personal and non-intrusive.	<a href="https://www.slybroadcast.com/">https://www.slybroadcast.com/</a>
EZ Texting	Text marketing platform that lets you stay in contact with your customers through text. Can use AI texting for customer support.	<a href="https://www.eztexting.com/">https://www.eztexting.com/</a>

# FOLLOW THE LEADER

Following the examples of others in business is important because it offers a valuable opportunity to learn from their experiences, avoid mistakes, and implement proven strategies.

By studying successful entrepreneurs and businesses, you can gain insights into navigating challenges, making informed decisions, and adapting to market changes. This can lead to more efficient success, informed benchmarking, and improved networking, while also fostering innovation and helping you stay current in a dynamic business landscape. However, it's crucial to balance these lessons with critical thinking and creativity, tailoring strategies to your unique context and goals.

## Resources and people to follow on social media or reach out to for guidance:

- **Jackie Dozier** – Jackie Dozier is a seasoned grant writing professional with over 33 years of experience successfully securing funding for nonprofits and other organizations. Her 100-page book breaks down the grant writing process into sections, offers examples from funded grants, and includes worksheets to help nonprofits customize compelling applications. Dozier walks readers through every step, from writing and advising to editing and reviewing, to ensure they create an award-winning proposal. Here's a link to her book, *THE S-E-X-I Model Guidebook: Confidently Writing Competitive Grant Applications*
- **Intellitax Financial Solutions** - offers comprehensive financial services including expert tax preparation for individuals and businesses, credit repair, business setup assistance, notary services, IRS problem resolution, and financial planning. With personalized guidance, up-to-date expertise, and a transparent process, Intellitax aims to simplify clients' financial journeys and optimize their overall financial health and success. <https://intellitaxfinancialsolutions.com/>
- **APEX Accelerators**: If you need assistance with acquiring a federal contract, contact an APEX Accelerator for assistance. You can locate someone in your area by visiting [www.apexaccelerators.us](http://www.apexaccelerators.us).
- **Grants.gov Support Center**: If you have questions about applying for or managing grants, visit the Grants.gov Support Center for online resources and Application support.



# **BUSINESS FOUNDATIONS**

# STEPS TO START A BUSINESS (IN TEXAS)

The steps below are the general guidelines for registering a Limited Liability Company (or other entity) in the state of Texas. The process and fees for registering a business varies depending on the state. If you are not registering a business in Texas, or if you have already registered your business in your state, you can skip to the section about your Business Category Codes.

## TEXAS SECRETARY OF STATE BUSINESS FILINGS FEE SCHEDULE

As of April 2024, the Texas Secretary of State requires a \$300 filing fee to obtain a Certificate of formation for a Texas Limited Liability Company (LLC). Nonprofit corporations and cooperative associations are \$25, and Professional Associations (PA) or Limited Partnerships (LP) are \$750.

<b>Business Organizations &amp; Nonprofits</b>	<b>Fee</b>
Any instrument for which no express fee is provided (except nonprofit corporation or cooperative association)	\$15
Any instrument for which no express fee is provided for a nonprofit corporation or cooperative association	\$5
<b>Formation &amp; Registration</b>	
Certificate of formation for a Texas entity (except nonprofit corporation, cooperative association, PA or LP) (Forms 201, 203, 205, 206)	\$300
Certificate of formation for a Texas professional association or limited partnership (Forms 204, 207)	\$750
Certificate of formation for a Texas nonprofit corporation (Form 202) or cooperative association	\$25
Registration or renewal as a Texas limited liability partnership or LLLP (Form 701)	\$200 per partner
Foreign entity application for registration (except nonprofit corporation, LLP, cooperative association or credit union) (Forms 301, 303, 304, 305, 306, 309, 311, 312, 313)  * A foreign entity that has transacted business in Texas for more than ninety days without registering is subject to a late filing fee. The late filing fee is equal to the registration fee for each full or partial calendar year that the foreign entity transacted business in Texas without being registered.	\$750*
Foreign nonprofit corporation, cooperative association, or credit union application for registration (Forms 302, 309)  * A foreign entity that has transacted business in Texas for more than ninety days without registering is subject to a late filing fee. The late filing fee is equal to the registration fee for each full or partial calendar year that the foreign entity transacted business in Texas without being registered.	\$25*
Foreign limited liability partnership application for registration or renewal (Forms 307, 308)  * A foreign entity that has transacted business in Texas for more than ninety days without registering is subject to a late filing fee. The late filing fee is equal to the registration fee for each full or partial calendar year that the foreign entity transacted business in Texas without being registered.	\$200 per partner in Texas, but not less than \$200 nor more than \$750*
Name registration or renewal for foreign entity not qualified to transact business in Texas (Forms 502, 505)	\$40
Withdrawal of name registration of foreign entity not qualified to transact business in Texas (Form 508)	\$15

## WAIVED FILING FEES FOR VETERANS IN TEXAS

For veteran business owners in Texas looking to form a Limited Liability Company (LLC), there are specific benefits and steps to be aware of. Thanks to Senate Bill 938 (87th Reg., 2021), some new veteran-owned businesses are exempt from certain filing fees and the Texas franchise tax for up to five years (or until the business no longer qualifies under this status).

### WHO QUALIFIES FOR THE VETERAN FILING FEE EXEMPTION?

To qualify for the filing fee exemption, the business must be:

- Formed or organized in Texas between January 1, 2022, and December 31, 2025.
- Entirely owned by one or more honorably discharged veterans from any branch of the U.S. Armed Services.

### HOW TO CLAIM THE FILING FEE EXEMPTION

The formation process involves:

- 1. Obtaining a Veteran Verification Letter for each owner of the business from the Texas Veterans Commission.**  
Go to the Texas Veterans Commission website and download and follow the steps within the New Veteran-Owned Business Pre-Qualification Process document.
- 2. Completing a Certification of New Veteran-Owned Business**  
After you receive your Veteran Verification Letter from the Texas Veterans Commission, you'll receive step-by-step instructions on how to complete a certification of Comptroller Form 05-904: Certification of New Veteran-Owned Business and submitting a Certificate of Formation to the Secretary of State.
- 3. Submitting a Certificate of Formation**  
Submit a Certificate of Formation for your new business entity alongside the above documents to the Secretary of State, preferably via SOSUpload for faster processing.



Note: While exempt from the state franchise tax during this initial period, the new veteran-owned business must still file specific reports with the Comptroller of Public Accounts. Further information can be found on the Comptroller's website.



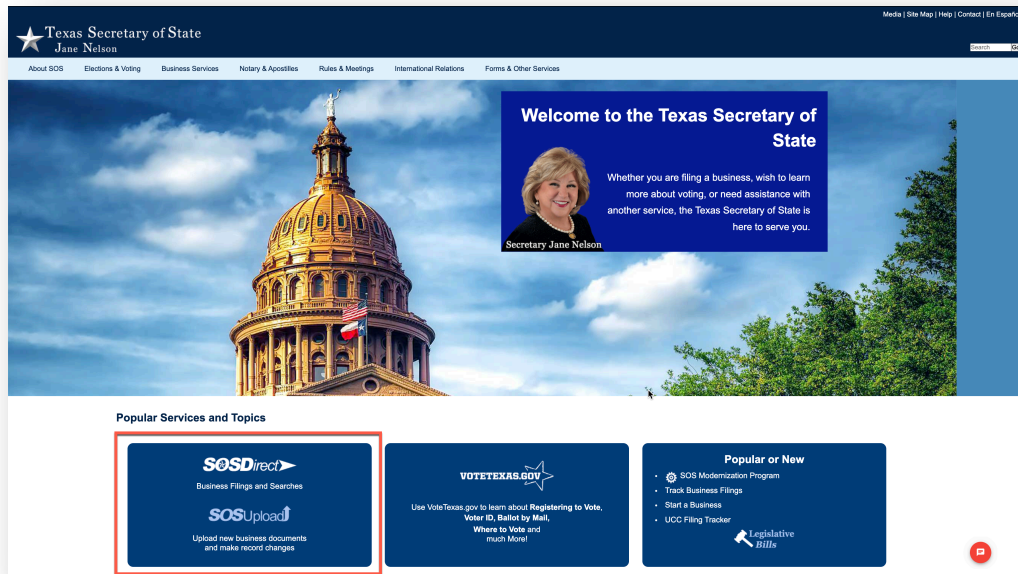
Note: registering your business with the Secretary of State creates your account with the Texas Comptroller's Office.

## REGISTER YOUR LLC:

The first step is to register your business as an LLC (Limited Liability Company) with the Texas Secretary of State at the link below. This will give your business a legal structure and protect your personal assets.

## STEPS TO REGISTER YOUR LLC WITH THE TEXAS SECRETARY OF STATE (SOS)

- 1.) Head over to the Texas Secretary of State's website at: <https://www.sos.state.tx.us/>
- 2.) Next, click "SOSDirect"



- 3.) On the next page, click the "enter site" button.



An Online Business Service from the Office of the Secretary of State

- 4.) If you are just starting out, you most likely do not have an SOSDirect account. If that's the case and you are not a current subscriber to the SOSDirect system, you will need to submit a request for SOSDirect Account by clicking the request link.
- 5.) Complete and submit the "**SOSDirect Account Acknowledgment**" form on the next page to obtain a regular SOSDirect Account. Enter either your Business Name or your First and Last name and click "**Continue**"

ENTER ACCOUNT NAME (enter only <u>one</u> name - business or individual)			
BUSINESS NAME *			
<input type="text"/>			
or			
INDIVIDUAL LAST NAME *	FIRST NAME *	MIDDLE NAME	SUFFIX
<input type="text"/>	<input type="text"/>	<input type="text"/>	None ▾
<div>Continue Reset</div>			

- 6.) On the next page, enter your address and choose an alpha-numeric password (8 - 20 characters) which you will use in conjunction with the USER ID that the Secretary of State will assign to you via email to access the site. When you are done, click **continue**.

Enter Account Address				
ADDRESS 1 *				
<input type="text"/>				
ADDRESS 2				
<input type="text"/>				
CITY *	STATE *	ZIP *	ZIP EXT	
<input type="text"/>	TX ▾	<input type="text"/>	-	<input type="text"/>
COUNTRY *				
UNITED STATES OF AMERICA ▾				
PHONE *	EXT	FAX	EMAIL *	
<input type="text"/>	- <input type="text"/>	<input type="text"/>	<input type="text"/>	
Enter Web Password - may be up to 20 characters long				
NEW PASSWORD		CONFIRM PASSWORD		
<input type="text"/>		<input type="text"/>		

- 7.) On the next page enter your payment information. You will not be charged right away, but the payment information that you enter can be used to pay for fees associated with registering your business or filing other paperwork with the Secretary of State. When you are done, click **continue**.

CREDIT CARD INFORMATION - enter name and address exactly as on card statement

Fees paid by credit card are subject to the statutorily authorized convenience fee of 2.7% of total fees.

CARD TYPE \*

VISA

CARD NUMBER \*

EXPIRATION DATE \*

MONTH:  YEAR:

SECURITY CODE \*

Credit Card entry not accessible? Make browser setting changes as described [here](#) and retry.

BUSINESS NAME \*

or

INDIVIDUAL LAST NAME \*

ARIEL

FIRST NAME \*

DAVIS

MIDDLE NAME

SUFFIX

None

ADDRESS 1 \*

ADDRESS 2 \*

CITY \*

STATE \*

TX

ZIP \*

ZIP EXT

COUNTRY \*

UNITED STATES OF AMERICA

PHONE \*

EXT

Continue

8.) On the next page, review the Terms of Use Agreement, and click **accept**.

Texas Secretary of State

Jane Nelson

Trademarks

Notary

Account

Help/Fees

Briefcase

Logout

I Accept

I Decline

SOSDirect Account Acknowledgment

Terms of Use Agreement

the Business and Public Filings Division of the Texas Secretary of State (SOS). As is true for many other Web sites, this Web site has rules that apply to your use of this Site and to any services available through this Site. Those rules, referred to as "terms of use," are set forth in this Terms of Use Agreement. You must evidence your acceptance of these terms of use by clicking on the "I accept" button at the bottom of this page. If you do not accept the terms of use, indicate by clicking the "I do not accept" button at the bottom of the page; you will then be returned to the home page. By accepting the terms of use, you are agreeing to comply with and be bound by the following terms of use. Please review them carefully. If you are a temporary user of this Site, you will be able to conduct searches, review the results of those searches and order copies or certificates. Only SOSDirect subscribers will be able to submit filing documents over the Web.

**2. Who Owns This Site?** This Site is owned by the State of Texas, under the operation of the Texas Secretary of State. The Texas Secretary of State is the statutorily authorized filing officer for certain business entity and Uniform Commercial Code records. The Business and Public Filings Division maintains these records. Among the business entity records maintained in this division are business corporation, non-profit corporation, limited partnership, and limited liability company records. These records are collectively referred to as Business Organizations records. State trademark and service mark records are referred to as Trademarks. The Uniform Commercial Code records are referred to as U.C.C. records.

**3. Fees and Payment Methods.** Under Section 405.018 of the Texas Government Code, the Secretary of State is required to set and collect a fee for electronic access to its records. In accordance with this directive, the SOS has set a fee of \$1.00 for inquiries over the Web. This inquiry fee is not applicable when the inquiry is used in connection with electronic filing of a document over the web or used in connection with entering copies or certificates over the web. The applicable statute sets fees for copies, orders and filings. Expedited fees do not apply to web orders or filings. Temporary users must pay all fees by credit card. SOSDirect Access subscribers may pay fees by credit card, LegerCase or direct account. Client accounts must be funded in order to use the account as a payment method for filing documents. Order and inquiry fees may accrue as accounts receivable in the client account. The SOS accepts Visa, MasterCard and Discover card. The convenience fee provided for in Section 405.031 of the Government Code will be assessed for Web credit card transactions.

**4. Hours of Operation.** This Site is normally available 24 hours a day Monday through Saturday. Due to system maintenance requirements, availability of the Site on Sunday will be from 6:00 am to midnight (Central Time). If the hours of availability change, the SOS will notify its subscribers.

**5. Cookies.** The Web Site's service application uses session and persistent cookies to authenticate and facilitate user logins. These cookies collect the user's name, email, phone, and fax number which allow access to our online databases without requiring the re-entry of any login data. Furthermore, these cookies have a life span of 30 days. If you do not wish for this Site to be stored on your hard drive you may disable the use of cookies from your browser. This feature is usually found in the Security or Preference settings of your browser.

**6. Breach of Computer Security.** This site has security measures in place to protect the loss, misuse and alteration of the information/data under our control. Unauthorized use of this Web site or conduct amounting to a breach of computer security as provided by Section 33.02 of the Texas Penal Code is a Class A misdemeanor. By accepting the terms of this agreement, the subscriber agrees to indemnify the state for any loss caused by conduct of the subscriber or an employee or agent of the subscriber that amounts to a breach of computer security.

**7. Right to Change the Site.** The SOS may discontinue, edit, delete or change any aspect of the Site, including, but not limited to: (i) restricting availability times, (j) restricting compatibility with certain computer software or hardware, (k) restricting amounts of use permitted, and (l) restricting, suspending or terminating any user's right to use the Site, at the SOS's sole discretion and without prior notice or liability.

**8. Entire Agreement.** You agree that this Terms of Use Agreement ("Agreement") constitutes the entire agreement between you and the SOS with respect to your use of the Site, and supersedes all previous and contemporaneous agreements, representations, warranties and understandings, written or oral, between the SOS and you with respect to the Site.

**9. Trademarks.** The name SOSDirect and the logo and other names for SOS products and services are trademarks/service marks of the SOS. Other product and company names mentioned on the Site may be trademarks/service marks of their respective owners.

**10. Copyrights and Public Information.** The content organization, graphics, design, computer code, compilation and other materials on or related to the Site are protected under applicable copyright, trademark and other proprietary and intellectual property rights of their respective owners. The data that is published on or collected via our Web site is public information. There is no restriction placed on the use of such data by the SOS, although certain information and names contained in the data may be owned by third parties and protected under applicable copyright, trademark and other proprietary and intellectual property rights of those third parties. You do not acquire ownership rights to any content, document or other materials viewed through the Site or obtained from the Site.

**11. Limited Right to Use.** Except as may otherwise be allowed by law, the viewing, printing or downloading of any content, graphic, form or document from the Site grants you only a limited, nonexclusive license for use solely by you for your own personal use, and not for reproduction, distribution, assignment, additional sale, presentation of derivative works or other use. No part of any content, graphic, form or document may be reproduced in any form or incorporated into any information retrieval system, electronic or mechanical, other than for your personal use (not for resale or redistribution). You must keep intact all copyright and other proprietary notices. The SOS may revoke this license at any time.

**12. Prohibited Behavior.** You are prohibited from using the Site in any way to do any of the following: a. resist or inhibit any other user from using and enjoying the Site; b. post or transmit any unlawful, threatening, abusive, libelous, defamatory, obscene, vulgar, pornographic, profane or indecent information of any kind, including without limitation any transmissions constituting or encouraging conduct that would constitute a criminal offense, give rise to civil liability or otherwise violate any local, state, national or international law; c. post or transmit comments containing harassing or offensive language, including sexual references, sexual advances, racial slurs or hate or deliberately offensive comments or engage in disruptive activities online, including excessive use of scripts, sound effects, scrolling repeating the same message over and over, or use viruses, robots, worms or Trojan horses; d. upload, post, e-mail, or otherwise transmit, or post links to any content that facilitates hacking, e. access another person's or entity's, account information or breackage files without the permission of that person or entity; f. post or transmit any information, software or other material which violates or infringes the rights of others, including material which is an invasion of privacy or publicity rights or which is protected by copyright, trademark or other proprietary right without first obtaining permission from the owner or right holder; g. upload, post or otherwise transmit any information, software or other material that contains a virus, worm, time bomb, trap door, or any other harmful component that is designed to interrupt, destroy, impair or limit the functionality, or interfere in the performance of the products and services of the SOS; h. post or transmit content that encourages or provides instructional activities about illegal activities, such as hacking; i. post, transmit or in any way exploit any information, software or other material for advertising or commercial purposes; j. solicit other users to join, become members of, or contribute money to any online service or other organization, website or attempt to get users to join in legal or illegal schemes or plan or participate in scams involving other users; k. impersonate any person or entity or falsely state or otherwise misrepresent your professional or other affiliation with any person or entity including, but not limited to an SOS official or employee; l. decompile, disassemble, modify, translate, adapt, reverse engineer, create derivative works from, or sublicense any proprietary software displayed in connection with SOS products and services; m. use the Site to collect personally identifying information about users of the Site in violation of the SOS's Privacy Policy; or n. perform any activities that the SOS determines in its sole discretion may be harmful to SOS, the Site or other users of the Site.

**13. No Unlawful Purposes.** You agree that you will not use the Site or any information or services related thereto for any unlawful purpose. The SOS, at its sole and absolute discretion, shall determine whether any use violates this provision.

**14. Penalties for Signing False Documents.** The Texas Business Corporation Act, article 13.02, Texas Non-Profit Corporation Act, article 13.06-0.03A, the Texas Limited Liability Company Act, article 9.02, and the Texas Revised Partnership Act, section 13.08(b)(13), provide that if a person signs a document which the person knows is false in any material respect and the intent that the document be delivered to the secretary of state to be filed on behalf of a corporation, limited liability company, or registered limited liability partnership, the person has committed an offense. The Texas Business Corporation Act further provides that the offense is a state jail felony if the person's intent is to defraud or harm another. The Texas Revised Limited Partnership Act, section 2.04(c), provides that the execution of a certificate or a written statement constitutes an oath or affirmation, under penalties for perjury, that, to the best of the affiant's personal knowledge and belief, the facts stated in the certificate or statement are true. Further, a person who signs a document under section 2.03 of the Texas Revised Limited Partnership Act if a certificate of limited partnership, or a certificate of amendment, merger, or dissolution contains a false statement or material omission, or is forged or is signed by a person not authorized by the partnership to execute the document, Business & Commerce Code, section 36.27, provides that a person commits an offense if the person knowingly or intentionally signs and presents for filing or causes to be presented for filing an assumed name document that: (1) violates the law; (2) contains a false statement, or (3) is forged. The offense is punishable as if it were an offense under the Texas Penal Code, section 37.10 (tampering with a governmental record).

**15. Monitoring.** You understand that the SOS has no obligation to monitor the Site. However, the SOS reserves the right at all times to disclose any information as necessary to satisfy any law, regulation or governmental request, or to refuse to post or to remove any information or materials, in whole or in part, that in the SOS's sole and absolute discretion are objectionable or in violation of this Agreement. You acknowledge that the SOS reserves the right, and may from time to time, monitor any and all information transmitted or received through the Site, for operational and other purposes, subject to the SOS's Privacy Policy. During monitoring, information may be examined, disclosed, and used for authorized purposes in accordance with the SOS's Privacy Policy. Use of the Site constitutes consent to such monitoring.

**16. Submissions.** The SOS is pleased to hear from users and welcomes your comments regarding the SOS's programs and services. If you submit any original creative ideas, suggestions, notes, concepts, or materials to the SOS ("Submissions"), they shall be deemed, and shall remain, the property of the SOS, and shall otherwise be subject to the provisions of Sections 9 or 10 above. None of the Submissions shall be subject to any obligation of confidence on the part of the SOS, and the SOS shall not be liable for any use or disclosure of any Submissions. Without limitation of the foregoing, the SOS shall exclusively own all now

9.) You will then be directed to a confirmation page that looks like this:

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You have successfully submitted a request for subscription to SOSDirect.

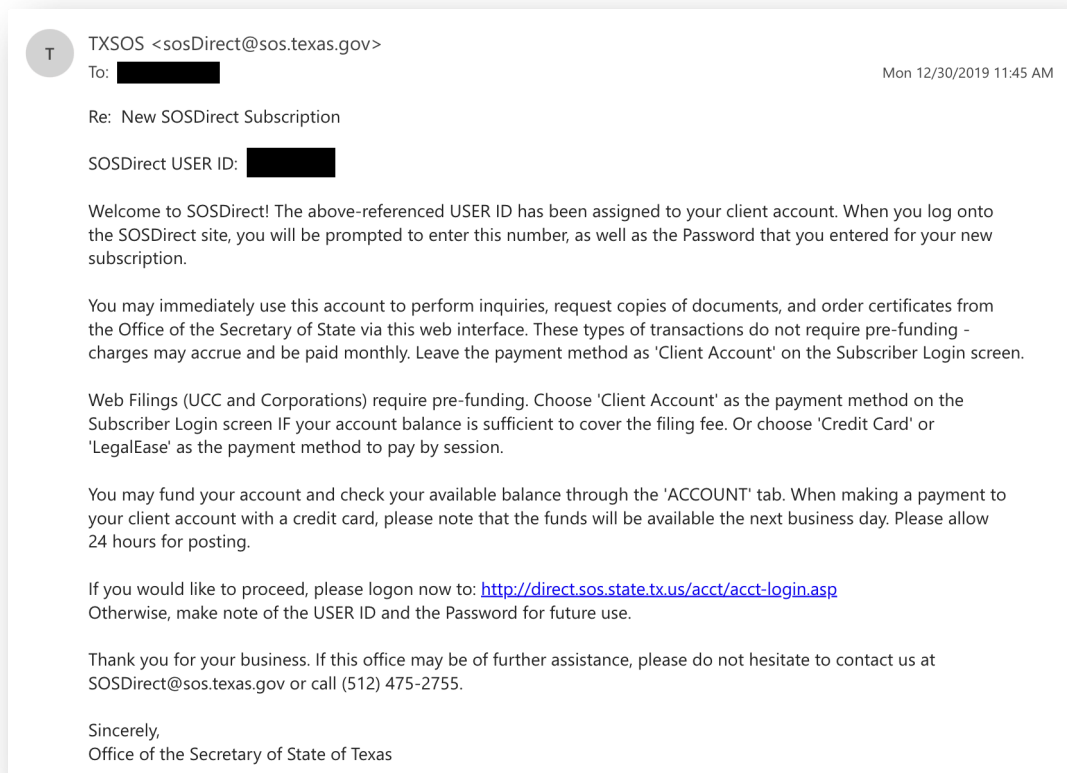
You will be notified by e-mail of the assigned USER ID within one (1) hour. If not received within one (1) hour, please contact [sosdirect@sos.texas.gov](mailto:sosdirect@sos.texas.gov) or call (512) 475-2755 for assistance.

Once received, you may logon using the assigned USER ID and the Password you entered earlier in the Subscription screens.

*Section 405.018 of the Texas Government Code authorizes the Office of the Secretary of State to provide the SOSDirect service and to set and collect a fee for use of the service.*

Thank you,  
Office of the Secretary of State

- 10.) Once you have completed your account request, please allow 15 minutes for SOS to process your request. You will be notified of your SOSDirect User ID and Password via e-mail. It should look something like this:



- 11.) Use the User ID within the “New SOSDirect Subscription” email and the password that you selected during the SOSDirect subscription request process to log into your SOSDirect account at <http://direct.sos.state.tx.us/acct/acct-login.asp>

**SOSDirect USER ID**

**PASSWORD**

[Forgot my password.](#)

Need Assistance? [Contact us at SOSDirect@sos.texas.gov](mailto:SOSDirect@sos.texas.gov).



- 12.) After logging in, review your contact information. If everything looks correct, click **continue**.


**Please provide the following information to complete login.**

<div>Continue</div>	
<b>PAYMENT INFORMATION</b> - Select payment method for this batch.	
* PAYMENT METHOD:	<div>Credit Card</div> <div>Use Credit Card or LegalEase for payment method unless client account has funded 1 hour in advance.</div> <div>Note: Credit card company may decline payment if name and address do not match card statement.</div>
<b>CONTACT INFORMATION</b>	
Please enter your user information in the fields below.	
* CONTACT NAME:	<div></div>
* PHONE:	<div></div> <div>...</div>
FAX:	<div></div>
* EMAIL:	<div></div>
CLIENT REFERENCE:	<div></div>
<b>SHIPPING INFORMATION</b> (APPLIES TO UCC ONLY)	
<div><input type="checkbox"/> Check box to verify shipping information.</div>	

- 13.) On the next page, review the payment information. If everything looks correct, click continue.



**PAYMENT INFORMATION** - Select payment method for this batch.

\* **PAYMENT METHOD:** Credit Card 



**Use Credit Card or LegalEase for payment method unless client account has been funded 1 hour in advance.**

**Note: Credit card company may decline payment if name and address do not match card statement.**

---


**CREDIT CARD INFORMATION** - enter name and address exactly as on card statement


**Fees paid by credit card are subject to the statutorily authorized convenience fee of 2.7% of total fees.**

**CARD TYPE \*** VISA  **CARD NUMBER \***  **EXPIRATION DATE \*** MONTH:   YEAR:


**SECURITY CODE \***

Credit Card entry not accessible? Make browser setting changes as described [here](#) and retry.





**BUSINESS NAME \***  


**or**

**INDIVIDUAL LAST NAME \***  **FIRST NAME \***  **MIDDLE NAME**  **SUFFIX** None 

**ADDRESS 1 \***


**ADDRESS 2**

**CITY \***  **STATE \*** TX  **ZIP \***  **ZIP EXT**  

**COUNTRY \*** UNITED STATES OF AMERICA 

**PHONE \***  **EXT**

- 14.) This should log you into the SOSDirect web site. Make note of your session code on this page so that you can review your SOSDirect briefcase to check your order status and retrieve orders.

 **Texas Secretary of State**  
Jane Nelson

UCC Business Organizations Trademarks Notary Account Help/Fees Briefcase Logout

SOSDirect Account Login

Wild Monkey, LLC,  
You are logged into the SOSDirect web site. Your client status indicates you are permitted full access to all UCC, Business Organizations, and Trademarks functionality available on the SOSDirect site. Your session code is:  Please make note of this session code and review your briefcase to check on status of and retrieve orders.

Fees paid by Credit Card are subject to the statutorily authorized convenience fee of 2.7% of total fees.

- 15.) Next click the “**Business Organizations**” tab

**Business Organizations**

- 16.) On the Business Organizations screen, select “**Domestic Limited Liability Company (LLC)**” from the dropdown under the Web Filing section, and click **File Document**.

<b>CLIENT REFERENCE (optional): [NONE]</b>	
• <b>Client Reference:</b>	<input type="text"/> <input type="button" value="Update Client Reference"/>
<b>INQUIRIES AND ORDERS</b>	
• <a href="#">Name Availability Search</a>	• <a href="#">Filing Number Search</a>
• <a href="#">Find - Entity</a>	• <a href="#">FEIN Search</a>
• <a href="#">Find - Supplemental</a>	• <a href="#">TID Search</a>
• <a href="#">Find - Global</a>	• <a href="#">Document Number Search</a>
• <a href="#">Find - Assumed Name</a>	• <a href="#">Order - Certificates and Copies</a>
• <a href="#">Find - People</a>	• <a href="#">Bulk Order - Data</a>
• <a href="#">Find - Registered Agent</a>	• <a href="#">Registered Agent activity past 60 days</a>
<b>WEB FILINGS</b>	
<b>DO NOT USE 'BACK' BUTTON</b> Use of the 'BACK' button during the "WEB FILINGS" process will result in loss of data. Please press the 'Cancel Filing' button and start again.	
• <b>Reservation * Formation * Registration Documents</b> First select the type of entity for which you wish to submit a filing, and then click 'File Document' <div><input type="text" value="Domestic Limited Liability Company (LLC)"/> <input type="button" value="File Document"/></div>	
File assumed name certificates, changes to registered office/agent, dissolutions, reinstatements, cancellations, withdrawals and annual statements as change documents.	
• <b>Change Documents</b> Enter filing number and click 'File Document' or click 'Find Entity' <div><input type="text"/> <input type="button" value="Find Entity"/> <input type="button" value="File Document"/></div>	
• <a href="#">Master Filing</a>	
• <a href="#">Master Filing Search/Cost Estimator</a>	

- 17.) On the next page, select “**Certificate of Formation**” from the dropdown, and click **continue**.

[View instructions for all corp web filings.](#)

There is a filing fee associated with all filings. To review the filing fee schedule, please cli

<b>Filing Type:</b>
<div><input type="text" value="Certificate of Formation"/> ▾</div>
<div><input type="button" value="Continue"/> <input type="button" value="Cancel Filing"/></div>

- 18.) On the next screen, select Limited Liability Company and enter your business name.

**Article 1 - Entity Name and Type**

Organization Type

☒ 1. Limited Liability Company

☐ 2. Professional Limited Liability Company

The name of the limited liability company is as set forth below.

If **option 1** is selected, the name of the entity must contain the words "Limited Liability Company" or "Limited Company," or an accepted abbreviation of such terms. If **option 2** is selected, the name of the entity must contain the words "Professional Limited Liability Company" or an accepted abbreviation of such terms. The name must not be the same as, deceptively similar to or similar to that of an existing corporate, limited liability company, or limited partnership name on file with the secretary of state.

A preliminary check for "name availability" is recommended.

**WARNING:** The rules relating to entity name availability are complex. Even if you believe that the search results indicate that the name is available, the Secretary of State might reject the document after performing its own name search and review.

19.) On the next screen, enter the mailing address

**Initial Mailing Address**

Address to be used by the Comptroller of Public Accounts for purposes of sending tax information

Address \*

City \* State \* Zip Code \* Zip Ext \*

Country \*

UNITED STATES OF AMERICA

20.) On the next screen, enter your registered agent and office information, then click **continue**.

**Article 2 - Registered Agent and Office**

Business Name \*

OR

Last Name \* First Name \* Middle Name \* Suffix \*

Address \*

City \* State \* Zip Code \* Zip Ext \*

TX

CONSENT

☐ Consent attached. ☒ Consent on file with entity.

21.) Next, enter your management information, then click **continue**.

**Article 3 - Governing Authority**

Management Type

☒ The limited liability company is to be managed by managers. The names and addresses of the initial managers are set forth below:

☐ The limited liability company will not have managers. Management of the company is reserved to the members. The names and addresses of the initial members are set forth below:

Manager/Member Name and Address Information

Edit	Delete	Action	Name	Address
Add Manager/Member				

Continue Cancel Filing

22.) On the next screen, fill in your governing authority information and click **update**.

**Article 3 - Governing Authority**

Business Name \*

OR

Last Name \* First Name \* Middle Name Suffix

Address \*

City \* State \* Zip Code \* Zip Ext

Country \*

UNITED STATES OF AMERICA

Update Cancel

23.) Next, select your management type for the individual and click **continue**.

**Article 3 - Governing Authority**

Management Type

☒ The limited liability company is to be managed by managers. The names and addresses of the initial managers are set forth below:

☐ The limited liability company will not have managers. Management of the company is reserved to the members. The names and addresses of the initial members are set forth below:

Manager/Member Name and Address Information

Edit	Delete	Action	Name	Address
Edit	Delete	Added	Manager	

Add Manager/Member

Continue Cancel Filing



Congratulations! You just hit a milestone. Now that you have an LLC, you can apply for and EIN



Note: later in this guide, I recommend using an Operating Agreement that requires the LLC to be structured such that it is managed by its members. There is more information about this recommendation under the **Operating Agreement** section. Read ahead to that section to determine whether you would like to use my recommended Operating Agreement or a Standard Operating Agreement. Depending on your choice, you will need to make specific selections about the management of your business on your LLC filing. If you skip this step and later decide to use my recommended Operating agreement, you may be required to amend your original filing.

### *Certificate of Good Standing / Certificate of Fact*

Some banks require you to submit a “Certificate of Good Standing” before you can receive a bank account from their institution. In the state of Texas, this is also called a Certificate of Fact.

The Texas Secretary of State does not automatically provide this document to new business owners, nor do they allow access to this information for third parties like baking institutions. Instead, you must request a Certificate of Fact from the Texas Secretary of State at the link below.

[https://direct.sos.state.tx.us/corp\\_order/corp\\_order-order.asp](https://direct.sos.state.tx.us/corp_order/corp_order-order.asp)

Here’s a screenshot of the form that you’ll need to complete to receive your Certificate of Fact.

**Add Order Item**

Order Type: Certificate of Fact Fact Type: Status

Filing Number: 12345678 Find Entity... Trademark Registration Number: Find Trademark...

Add Order Item Return To Search Results

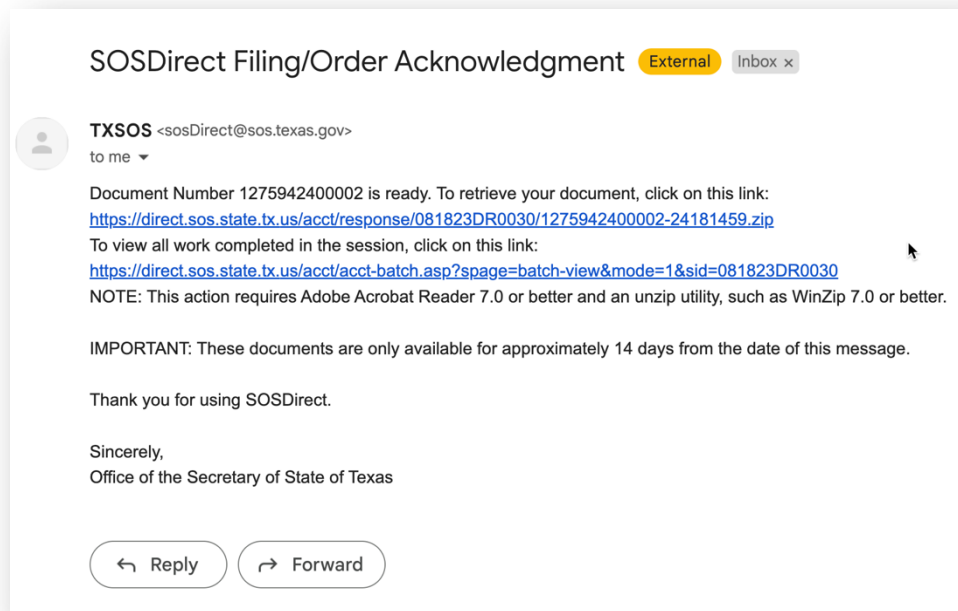
**Current Order Items for this Order**

Delete	Order Details	Order Type
No order items have been entered for this order.		

Submit Order Cancel Order

The fee for this form as of August 2023 is \$15, and it can take up to three business days to receive. However, I received mine within 24 hours.

Once the form has been submitted, you will receive an email from TX SOS like the one below. Click the link within the email to review and download your document.



## IDENTIFY YOUR BUSINESS CATEGORY CODES

### PRIMARY NAICS CODE(S)

The North American Industry Classification System (NAICS) code is a six-digit code that classifies business establishments. You'll need to know your primary NAICS code to complete your registration on SAM.gov.

SAM.gov registration is required for all sorts of things including but not limited to the following:

- Federal Contracting
- Federal Grants
- SBA Certifications (SDVOSB/VOSB, WOSB, etc)

The NAICS code can also be used to later search for relevant contracting opportunities on SAM.gov and other bid boards like Bonfire Hub. You can identify your NAICS code on the NAICS Association website at the link below.

<https://www.naics.com/search/>

Once you have identified your primary and secondary NAICS codes, you'll want to document them so that you can refer to them for later use. You can use your own notes or jot them down on the records worksheet in this workbook.



Note: there is no limit to the number of times you can add, remove, or change NAICS Codes in SAM.gov. If you find a federal contracting opportunity under a different NAICS Code, you can simply make changes in SAM.gov whenever your business grows or adapts.

## IDENTIFY YOUR PRODUCT & SERVICE CODE

Like the NAICS code, some government contracting opportunities require you to classify your business based on a Product and Service Code. Review the Product and Service Code Manual page linked below to find the Product and Service Code(s) (PSC Code) that corresponds to your business.

<https://www.acquisition.gov/psc-manual>

Once you have identified your primary and secondary PSC codes, you'll want to document them so that you can refer to them for later use. You can use your own notes or jot them down on the records worksheet in this workbook.

## IDENTIFY YOUR NGIP CODE

You can review the State of Texas NIGP Commodity Book on the Texas Comptroller of Public Accounts website at the link below. It can also be downloaded here: TX Comptroller Commodity Book (NGIP).csv

<https://mycpa.cpa.state.tx.us/commbook/>

Once you have identified your primary and secondary NGIP codes, you'll want to document them so that you can refer to them for later use. You can use your own notes or jot them down on the records worksheet in this workbook.

## IDENTIFY YOUR SIC CODE

The Standard Industrial Classification Code (SIC) system is a "Self-Assigned" System. That means you pick the code that best suits your business and use it when asked for your code. For most official governmental purposes, SIC Codes have been discontinued and replaced by the NAICS coding system. However, the SIC Code can still be used to search for relevant contracting opportunities within some bid boards.

To identify the proper code for your company, use the SIC Identification Tools on the NAICS Association website to identify the code that best reflects your primary business activity.

Once you have identified your primary and secondary SIC codes, you'll want to document them so that you can refer to them for later use. You can use your own notes or jot them down on the records worksheet in this workbook.

## IDENTIFY YOUR UNSPSC CODE

The United Nations Standard Products and Services Code (UNSPSC) is an eight-digit numerical system for classifying products and services. Created by the UN Development Program and Dun & Bradstreet, it's used **only when mandated by a government or**

**commercial entity**, which requires an annual subscription fee. To apply for an annual subscription, visit the UNSPSC Store.

Once you have identified your primary and secondary UNSPSC codes, you'll want to document them so that you can refer to them for later use. You can use your own notes or jot them down on the records worksheet in this workbook.

## **GET AN EIN:**

The Employer Identification Number (EIN), sometimes called a Federal Employer Identification Number (FEIN), serves as an identification number for your business, similar to how a Social Security Number works for individuals. It's a unique, permanent number assigned by the Internal Revenue Service (IRS) that you'll use to open business bank accounts, apply for business licenses, and submit paper tax returns. You can obtain an EIN through the IRS website.

Follow the steps to apply for your EIN online. The application process takes less than 20 minutes, and you will receive your EIN instantly.

- 1.) Go to the IRS website (linked below)  
<https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>
- 2.) Click "Apply Online Now" to begin the EIN application Process.



An official website of the United States Government

IRS

Help | News | English | Charities & Nonprofits | Tax Pros

File | Pay | Refunds | Credits & Deductions | Forms & Instructions

Search

Home / File / Businesses and Self-Employed / Small Business and Self-Employed / Employer ID Numbers / Apply for an Employer Identification Number (EIN) online

## Apply for an Employer Identification Number (EIN) online

English | Español | 中文(简体) | 中文(繁體) | 한국어 | Русский | Tiếng Việt | Kreyòl ayisyen

**Individuals**

**Businesses and Self-Employed**

Business Tax Account

Small Business and Self-Employed

**Employer ID Numbers**

Business Taxes

Reporting Information Returns

Self-Employed

Starting a Business

Operating a Business

Closing a Business

Industries/Professions

Small Business Events

Online Learning

Large Business

Corporations

Partnerships

**Charities and Nonprofits**

**Hours of operation**

Monday to Friday, 7 a.m. to 10 p.m. Eastern Standard Time.

### Step 1: Determine your eligibility

- You may apply for an EIN online if your principal business is located in the United States or U.S. Territories.
- The person applying online must have a valid Taxpayer Identification Number (SSN, ITIN, EIN).
- You are limited to one EIN per [responsible party](#) per day.
  - The "responsible party" is the person who ultimately owns or controls the entity or who exercises ultimate effective control over the entity. Unless the applicant is a government entity, the responsible party must be an individual (i.e., a natural person), not an entity.

### Step 2: Understand the online application

- You must complete this application in one session, as you will not be able to save and return at a later time.
- Your session will expire after 15 minutes of inactivity, and you will need to start over.

### Step 3: Submit your application

- After all validations are done you will get your EIN immediately upon completion. You can then download, save, and print your EIN confirmation notice.

**Apply online now**

### Employer tax responsibilities explained (Publications 15, 15-A and 15B)

[Publication 15](#) [PDF](#) provides information on employer tax responsibilities related

### Related topics

- [Online EIN: Frequently asked questions](#)
- [Employer ID numbers](#)
- [Privacy Act Statement and Paperwork Reduction Act Notice](#)
- [Businesses with employees](#)


**Five Things to Know**

The Employer Identification Number

**Five Things to Know about the Employer Identification Number**

[Transcript](#) [ASL](#)

3.) On the EIN Assistant page, click “Begin Application”


**IRS**.gov

[Help](#) | [Apply for New EIN](#) | [Exit](#)

---

### EIN Assistant

---

#### Important Information Before You Begin

Use this assistant to apply for and obtain an Employer Identification Number (EIN).

[Do I need an EIN?](#)

[Do I need a new EIN?](#)

For help or additional information on any topic, click the underlined key words, or view Help Topics on the right side of the screen. Make sure that pop-ups are allowed from this site.

#### About the EIN Assistant

- You must complete this application in one session, as you will **not** be able to save and return at a later time.
- For security purposes, your session will expire after 15 minutes of [inactivity](#), and you will need to start over.
- You will receive your EIN immediately upon verification. [When will I be able to use my EIN?](#)
- If you wish to receive your confirmation letter online, we strongly recommended that you install [Adobe Reader](#) before beginning the application if it is not already installed.

#### Restrictions

- Effective May 21, 2012, to ensure fair and equitable treatment for all taxpayers, the Internal Revenue Service will limit Employer Identification Number (EIN) issuance to one per [responsible party](#) per day. This limitation is applicable to all requests for EINs whether online or by phone, fax or mail. We apologize for any inconvenience this may cause.
- If a [third party designee](#) (TPD) is completing the online application on behalf of the taxpayer, the taxpayer must [authorize the third party](#) to apply for and receive the EIN on his or her behalf.
- The business location must be within the United States or [U.S. territories](#).
- Foreign filers without an Individual Taxpayer Identification Number (ITIN) cannot use this assistant to obtain an EIN.
- If you were incorporated outside of the United States or the U.S. territories, you cannot apply for an EIN online. Please call us at 267-941-1099 (this is not a toll free number).

Begin Application >>

If you are not comfortable sending information via the Internet, download the [Form SS-4](#) PDF file and the instructions for alternative ways of applying.

[IRS Privacy Policy](#) | [Accessibility](#)

- 4.) On the Identify page, select the legal structure that matches the business that you have established. If you've been following the business registration process from the previous sections, your business structure is likely and LLC. Once you have selected the type you are applying for, click "continue"


[Help](#) | [Apply for New EIN](#) | [Exit](#)

EIN Assistant

Your Progress:

1. Identify

2. Authenticate

3. Addresses

4. Details

5. EIN Confirmation

### What type of legal structure is applying for an EIN?

Before applying for an EIN you should have already determined what type of legal structure, business, or type of organization is being established.

Choose the type you are applying for. If you don't see your type, select "View Additional Types."

- ☐ [Sole Proprietor](#)  
Includes individuals who are in business for themselves and household employers.
- ☐ [Partnerships](#)  
Includes partnerships and joint ventures.
- ☐ [Corporations](#)  
Includes S corporations, personal service corporations, real estate investment trusts (REIT), regulated investment conduits (RIC), and settlement funds.
- ☒ [Limited Liability Company \(LLC\)](#)  
A limited liability company (LLC) is a structure allowed by state statute and is formed by filing articles of organization with the state.
- ☐ [Estate](#)  
An estate is a legal entity created as a result of a person's death.
- ☐ [Trusts](#)  
All types of trusts including conservatorships, custodianships, guardianships, irrevocable trusts, revocable trusts, and receiverships.
- ☐ [View Additional Types, Including Tax-Exempt and Governmental Organizations](#)  
If none of the above fit what you are establishing, there are several others to choose from.

<< Back

Continue >>

[IRS Privacy Policy](#) | [Accessibility](#)

#### Help Topics

? [What if I do not know what type of legal structure or organization to choose?](#)

5.) On the next screen, read the disclosure and make sure that it aligns with your business structure. If the information is correct, click “continue.”

**IRS.gov** [Help](#) | [Apply for New EIN](#) | [Exit](#)

### EIN Assistant

**Your Progress:** 1. Identify 2. Authenticate 3. Addresses 4. Details 5. EIN Confirmation

**You have chosen Limited Liability Company.**

**What it is...**

- A limited liability company (LLC) is a structure allowed by state statute.
- An LLC is formed by filing articles of organization with the state's secretary of state office.
- An LLC must be unique in its state. There can be no more than one active LLC with the same name in the same state.
- For federal tax purposes, an LLC may be treated as a partnership or a corporation, or be disregarded as an entity separate from its owner.
- An LLC can have two or more [members](#) (multi-member) or one member (single-member).
- An LLC can have an unlimited number of members.
- An LLC's members may include individuals, corporations, other LLCs, or foreign entities.

**What it is not...**

- LLCs are not [incorporated](#) and do not file [articles of incorporation](#).

If you need to change your type of structure, we recommend that you do so **now**, otherwise you will have to start over and re-enter your information. Additional help may be found by reviewing [all types of organizations and structures](#) before making your selection.

[<< Back](#) [Continue >>](#)

[IRS Privacy Policy](#) | [Accessibility](#)

**Help Topics**

[? Can I be an LLC?](#)

6.) On the next screen, enter the number of **members** in your LLC, then select the state where your business is located.

The term "member" refers to someone who is part of an organization or company. In the context of an LLC, a member holds ownership and can be an individual. Depending on the number of members in your LLC, you will be considered either a **Single-Member LLC** or a **Multi-Member LLC** as the type of structure applying for an EIN.

- **Single-Member LLC:** Has only one member. The IRS must initially classify you as a “disregarded entity” for the purposes of filing a federal tax return. This means you report your LLC income and expenses directly on your personal tax return. If you’re an individual, you’ll use Form 1040 Schedule C, E, or F. If the member is another entity, report on its respective tax return.
- **Multi-Member LLC:** Has multiple members. The IRS must initially classify you as a partnership

If you are not sure of this information, refer to your business filing documents or speak to a tax professional.

When you're ready, click "continue"

The screenshot shows the IRS EIN Assistant web form. At the top is the IRS.gov logo and navigation links: [Help](#), [Apply for New EIN](#), and [Exit](#). Below the header is a progress bar with five steps: 1. Identify, 2. Authenticate, 3. Addresses, 4. Details, and 5. EIN Confirmation. The current step is '1. Identify'. The main heading is 'Tell us more about the members of the Limited Liability Company (LLC)'. A red callout '1' points to the text 'How many [member\(s\)](#) are in the LLC? \*'. The input field contains the number '3'. A second red callout '2' points to the dropdown menu for 'Please select the state/territory where the business is physically located: \*', which is currently set to 'TEXAS (TX)'. A third red callout '3' points to the 'Continue >>' button. At the bottom left is a '<< Back' button. The footer contains links for [IRS Privacy Policy](#) and [Accessibility](#).

IRS.gov

[Help](#) | [Apply for New EIN](#) | [Exit](#)

EIN Assistant

Your Progress: 1. Identify 2. Authenticate 3. Addresses 4. Details 5. EIN Confirmation

Tell us more about the members of the Limited Liability Company (LLC).

\* Required fields

1 How many [member\(s\)](#) are in the LLC? \* 3

2 Please select the state/territory where the business is physically located: \* TEXAS (TX)

<< Back 3 Continue >>

[IRS Privacy Policy](#) | [Accessibility](#)

7.) On the next screen, choose the reason that you are applying for an EIN and click "continue."

[Help](#) | [Apply for New EIN](#) | [Exit](#)

EIN Assistant

Your Progress:
1. Identify
2. Authenticate
3. Addresses
4. Details
5. EIN Confirmation

### Why is the LLC requesting an EIN?

Choose **one** reason that best describes why you are applying for an EIN.

1

- ☒ **Started a new business**  
Select this option if you are beginning a new business.
- ☐ **Hired employee(s)**  
Select this option if you already have a business and need to hire employees.
- ☐ **Banking purposes**  
Select this option if the reason for applying for the EIN is strictly to satisfy banking requirements or local law.
- ☐ **Changed type of organization**  
Select this option if you are changing the type of organization you currently operate, such as changing from a sole proprietor to a partnership, changing from a partnership to a corporation, etc.
- ☐ **Purchased active business**  
Select this option if you are purchasing a business that is already in operation.


2
Continue >>

**Help Topics**

- ? [I do not see my reason for applying here. What should I choose?](#)
- ? [What if more than one reason applies to me?](#)

[IRS Privacy Policy](#) | [Accessibility](#)

8.) On the “Authenticate” screen, enter your name, social security number and confirm whether you are an owner/member/managing member of the LLC or a third party acting on behalf of the LLC. Then click “continue.”


**IRS**.gov

[Help](#) | [Apply for New EIN](#) | [Exit](#)

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EIN Assistant

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**Your Progress:**
1. Identify ✓
2. Authenticate
3. Addresses
4. Details
5. EIN Confirmation

---

**Please tell us about the Responsible Party of the LLC.**

\* Required fields  
Must match IRS records or this application cannot be processed.  
The only punctuation and special characters allowed are hyphen (-) and ampersand (&).

1

First name \*

Middle name/initial

Last name \*

Suffix (Jr, Sr, etc.)

2

[SSN/ITIN](#) \*  -  -

**Choose One: \***

☒ I am one of the [owners](#), [members](#), or the managing member of this LLC.
 

3

☐ I am a third party applying for an EIN on behalf of this LLC.

**Before continuing, please review the information above for typographical errors.**

<< Back

4

Continue >>

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- 9.) Enter your address and phone number on the “Addresses” screen. Next, click “continue.”
- 10.) The IRS will then check your address against their database. If the address that you enter does not exactly match their database, the IRS will offer the database version for your review. Review and verify that the address is correct. The click either “Accept as Entered” or “Accept Database Version”
- 11.) On the “Details” screen, enter the LLC’s details including the legal name, trade names, county, state, and start date. Next, click “continue.”

Legal name of LLC (must match [articles of organization](#), if filed) \*

[Trade name/Doing business as](#) (only if different from legal name)

County where LLC is located \* LOS ANGELES

State/Territory where LLC is located \* CALIFORNIA (CA) ▼

State/Territory where [articles of organization](#) are (or will be) filed \* Select One ▼

LLC [start date](#) \* Select Month ▼ Year

Before continuing, please review the information above for typographical errors.

Continue >>

- 12.) Most businesses select no on the following screen. If you are not sure how to answer these questions, consult your CPA.

Does your business own a [highway motor vehicle](#) with a [taxable gross weight](#) of 55,000 pounds or more? \* ☐ Yes ☐ No

Does your business involve [gambling/wagering](#)? \* ☐ Yes ☐ No

Does your business need to file [Form 720](#) (Quarterly Federal [Excise Tax Return](#))? \* ☐ Yes ☐ No

Does your business sell or manufacture alcohol, tobacco, or firearms? \* ☐ Yes ☐ No

Do you have, or do you expect to have, any [employees who will receive Forms W-2](#) in the next 12 months? \* (Forms W-2 require additional filings with the IRS.) ☐ Yes ☐ No

Before continuing, please review the information above.

Continue >>

- 13.) On the next screen, identify your entity's primary revenue producing activity (what does the business do to make money)? Then click "continue." Depending on your selection, you may be asked to specify or offer a subcategory on the next 1-2 screens.



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**EIN Assistant**

Your Progress: 1. Identify ✓ 2. Authenticate ✓ 3. Addresses ✓ **4. Details** 5. EIN Confirmation

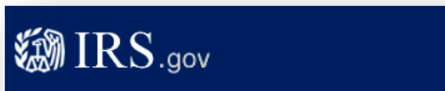
**You have chosen Other.**

Please choose **one** of the following that best describes your primary business activity:

- ☐ Consulting
- ☐ Manufacturing
- ☐ Organization (such as religious, environmental, social or civic, athletic, etc.)
- ☐ Rental
- ☐ Repair
- ☐ Sell goods
- ☐ Service
- ☒ Other – please specify your primary business activity:

<< Back Continue >>

- 14.) On the "EIN Confirmation" screen, select the method that you would like to receive your EIN Confirmation letter. You can either receive the letter online or by mail. We suggest receiving the letter online as this will allow you immediate access to your new EIN. You can view, print and save the letter as verification of your EIN. When you're ready, click "continue."
- 15.) The "EIN Confirmation" screen will show you a summary of your information. Review in carefully to ensure that everything is correct. When you're ready, click "Submit"



## EIN Assistant

Your Progress: 1. Identity ✓ 2. Authenticate ✓ 3. Addresses ✓ 4. Details ✓ 5. EIN Confirmation

### Summary of your information

Please review the information you are about to submit. If any of the information below is incorrect, you will need to [start a new application](#).

Click the "Submit" button at the bottom of the page to receive your EIN.

### Organization Type: LLC

#### LLC Information

Legal name:   
County:   
State/Territory: TX  
Start date: AUGUST 2023  
Closing month of accounting year: DECEMBER (The closing month of the accounting year is defaulted to December due to your organization type. To change your closing month of accounting year, complete [Form 1128](#).)  
State/Territory where articles of organization are (or will be) filed: TX

#### Help Topics

[What is Form 1128?](#)

#### Addresses

Physical Location:   
Phone Number:

#### Responsible Party

Name:   
SSN/ITIN:

#### Principal Business Activity

What your business/organization does: SOCIAL ORG  
Principal products/services: ENTERTAINMENT AND SOCIAL MEDIA

#### Additional LLC Information

Owns a 55,000 pounds or greater highway motor vehicle: NO  
Involves gambling/wagering: NO  
Involves alcohol, tobacco or firearms: NO  
Files Form 720 (Quarterly Federal Excise Tax Return): NO  
Has employees who receive Forms W-2: NO  
Reason for Applying: STARTED A NEW BUSINESS

We strongly recommend you print this summary page for your records as this will be your only copy of the application. You will not be able to return to this page after you click the "Submit" button.

Click "Submit" to send your request and receive your EIN

Submit

Once you submit, please wait while your application is being processed. It can take up to two minutes for your application to be processed.

- 16.) The next screen will confirm that your EIN has been successfully assigned and display your new EIN. Click the link to download and save your EIN confirmation letter. Remember to save this document in your secure files.

**IRS.gov**

**EIN Assistant**

Your Progress: 1. Identity ✓ 2. Authenticate ✓ 3. Addresses ✓ 4. Details ✓ 5. EIN Confirmation

**Congratulations! Your EIN has been successfully assigned.**


EIN Assigned:

Legal Name:

**IMPORTANT:**

Save and/or print this page and the confirmation letter below for your permanent records.

The confirmation letter below is your official IRS notice and contains important information regarding your EIN.

**1**  [CLICK HERE for Your EIN Confirmation Letter](#) [Help with saving and printing your letter](#)


Once you have saved or printed your letter, click "Continue" to get additional information about using your new EIN.

**Continue >>**

**Help Topics**

- [What if I do not have access to a printer at this time?](#)
- [Can I access this letter at a later date?](#)

- 17.) The next screen will give you some helpful information regarding how to use your EIN, how to make changes or corrections, and next steps



## EIN Assistant

Your Progress:
 1. Identity ✓
 2. Authenticate ✓
 3. Addresses ✓
 4. Details ✓
 5. EIN Confirmation

### Additional Information about your EIN

We suggest you print this page for your records.

#### When Can You Use Your EIN?

This EIN is your permanent number and can be used immediately for most of your business needs, including:

- Opening a bank account
- Applying for business licenses
- Filing a tax return by mail.

However, it will take up to two weeks before your EIN becomes part of the IRS's permanent records. You must wait until this occurs before you can:

- File an electronic return
- Make an electronic payment
- Pass an IRS Taxpayer Identification Number (TIN) matching program.

#### Next Steps (for LLC)?

If you do not wish to accept the default status of either partnership or disregarded entity, you can file:

- [Form 8832](#) (Entity Classification Election). This form must be completed in a timely manner to receive corporation status. See the instructions for complete information.
- [Form 2553](#) (Election by a Small Business Corporation). This form must be completed in a timely manner to receive S corporation status. See the instructions for complete information.

#### Acceptance or Non-Acceptance of Election

- The service center will notify the LLC as to the acceptance or non-acceptance of its election. The LLC should generally receive a determination on its election within 60 days after it has filed Form 8832 or Form 2553.
- Do not file Form 1120 (U.S. Corporation Income Tax Return) or Form 1120S (U.S. Income Tax Return for an S Corporation) until you receive notification of your acceptance.

You can download IRS forms, publications, and tax returns at <http://www.irs.gov/formspubs>

#### Corrections?

If you need to make changes to your organization's information, you must do so in writing and mail the information to the address provided at <https://www.irs.gov/businesses/business-name-change>.

<< Back
Continue >>

#### Help Topics

- [What is Form 8832?](#)
- [What is Form 2553?](#)

18.) **You did it!** You now have an assigned EIN for your business. Your EIN Confirmation Letter should look a little something like this:

Date of this notice: 2023

Employer Identification Number:

Form: SS-4

Number of this notice:

For assistance you may call us at:  
1-800-829-4933

IF YOU WRITE, ATTACH THE  
STUB AT THE END OF THIS NOTICE.

WE ASSIGNED YOU AN EMPLOYER IDENTIFICATION NUMBER

Thank you for applying for an Employer Identification Number (EIN). We assigned you EIN . This EIN will identify you, your business accounts, tax returns, and documents, even if you have no employees. Please keep this notice in your permanent records.

Taxpayers request an EIN for their business. Some taxpayers receive CP575 notices when another person has stolen their identity and are opening a business using their information. If you did not apply for this EIN, please contact us at the phone number or address listed on the top of this notice.

When filing tax documents, making payments, or replying to any related correspondence, it is very important that you use your EIN and complete name and address exactly as shown above. Any variation may cause a delay in processing, result in incorrect information in your account, or even cause you to be assigned more than one EIN. If the information is not correct as shown above, please make the correction using the attached tear-off stub and return it to us.

Based on the information received from you or your representative, you must file the following forms by the dates shown.

Form 1065 03/15/

If you have questions about the forms or the due dates shown, you can call us at the phone number or write to us at the address shown at the top of this notice. If you need help in determining your annual accounting period (tax year), see Publication 538, *Accounting Periods and Methods*.

We assigned you a tax classification (corporation, partnership, estate, trust, EPMP, etc.) based on information obtained from you or your representative. It is not a legal determination of your tax classification, and is not binding on the IRS. If you want a legal determination of your tax classification, you may request a private letter ruling from the IRS under the guidelines in Revenue Procedure 2020-1, 2020-1 I.R.B. 1 (or superseding Revenue Procedure for the year at issue). Note: Certain tax classification elections can be requested by filing Form 8832, *Entity Classification Election*. See Form 8832 and its instructions for additional information.

A limited liability company (LLC) may file Form 8832, *Entity Classification Election*, and elect to be classified as an association taxable as a corporation. If the LLC is eligible to be treated as a corporation that meets certain tests and it will be electing S corporation status, it must timely file Form 2553, *Election by a Small Business Corporation*. The LLC will be treated as a corporation as of the effective date of the S corporation election and does not need to file Form 8832.



Congratulations! You just hit a milestone. Now that you have an EIN, you can complete the steps necessary to obtain your business bank account/

Once you have been assigned your EIN, you'll want to document it so that you can refer to it for later use. You can use your own notes or jot it down on the records worksheet in this workbook.

## SET UP BUSINESS CHECKING

It's important to keep your business and personal finances separate, while tracking the money going into and out of your business as revenue and expenses. Having a business bank account will help you do that.

**You'll also need a business checking account to secure the following items:**

- a CAGE code from SAM.gov, which is essential for government contracting.
- Your business checking account number is also referenced during the WOSB certification application with the SBA.
- Set up payment processing such as Stripe, Square, Found, etc.



Note: Some banks require you to submit a certificate of good standing. In Texas, this is also called a Certificate of Fact. Some states, including Texas, NJ, Delaware, Michigan and others do not allow third party access to the Certificate of Fact document.

The Texas Secretary of State does not automatically provide the Certificate of Good Standing / Certificate of Fact to new business owners. Instead, you have to request a Certificate of Fact from the Texas Secretary of State. For more information, see the section titled "Certificate of Good Standing"

## Business Banking Resources

This section provides a concise overview of key business banking institutions, each offering a suite of services to support your company's financial needs. The details that follow will guide you through various options to align with your business strategy. Whether you seek specialized services or broad banking support, these profiles will inform your choice of a financial partner.

- Truemark Financial: A financial services company providing wealth management and retirement planning solutions. <https://www.truemarkfinancial.com/>
- Truist Bank: One of the largest commercial banks in the United States, formed from the merger of BB&T and SunTrust. <https://www.truist.com/>
- Key Bank: A regional bank headquartered in Cleveland, Ohio, with branches across the United States. <https://www.key.com/>
- Univest: A community bank and financial services company based in Pennsylvania. <https://www.univest.net/>
- PNC: A major diversified financial services institution headquartered in Pittsburgh, Pennsylvania. <https://www.pnc.com/>
- BofA (Bank of America): One of the largest banking institutions in the United States, with a focus on retail and commercial banking. <https://www.bankofamerica.com/>
- US Bank: A leading bank holding company and financial services provider based in Minneapolis, Minnesota. (<https://www.usbank.com/>)



Congratulations! You just hit a milestone. Now that you have Business Banking, you can:

Apply for Tier 1 Net 30 Accounts with Quill, Nav Boost, Uline, Grainger, Summa. These accounts start to report on your business credit in about 30 days. These tradelines will be

reported to your business credit, which then makes it possible to apply for Tier 2 accounts like the BP Gas Card, Amazon Credit Card, Office Max, and Best Buy.

Follow the same process for Tier 3 accounts such as Chase, American Express, Capital One, Bank of America without a personal guarantor.

## **ESTABLISHING BUSINESS CONTACT POINTS**

In this section, we'll cover steps to create a strong online presence for your business. From securing a unique domain to choosing a professional email and enhancing virtual visibility, these actions are crucial for establishing credibility in the digital world.

By the end of this section, you will understand the importance of a custom domain, custom branded emails, and factors when selecting a virtual address provider. You'll also gain a better understanding of the value of a user-friendly website and business listings for better online visibility. This information is tailored to help you establish effective digital contact points.

### **PURCHASE YOUR DOMAIN**

A domain is crucial for new business owners, especially those interested in government contracting. A domain establishes a professional online presence, essential for establishing credibility with government agencies. It ensures easy accessibility of your business information, supports secure and professional communication through custom email addresses, and aids in marketing and compliance efforts. Securing a domain also protects your brand and supports the necessary trust and reliability expected in the government procurement process.

#### **WAIT, WHAT'S A DOMAIN?**

Imagine the internet like a big city with lots of houses. Each house has its own address so you can find it easily. Well, a domain is like a house's address, but for websites on the internet. Instead of using complicated numbers to find a website, like 123.456.789.0, we use words that are easier to remember.

So, a domain is a name that you type into your web browser to go to a specific website. It's made up of two parts:

1. the main name that represents the website's name or topic, and
2. the ending part that shows what kind of website it is, like ".com" or ".org."

For example, if you want to create a website about cooking, you might type in "www.cookingwebsite.com." "Cookingwebsite" is the main name, and ".com" is the ending part.

## WHY DO I NEED A DOMAIN?

People and businesses buy domain names, so they have a special place on the internet for their websites. It's like having your own unique address so others can find you easily.

## HOW DO I PURCHASE A DOMAIN?

Buying a domain is like getting your own unique address for a website. Here's how you can do it:

- **Think of a Name:** First, come up with a name for your website. It could be your business name, your name, or something related to what you want to share on the website.
- **Check Availability:** Once you have a name in mind, you need to see if it's available. This is like checking if the address you want for your house is already taken. You can use a website called a "domain registrar" to do this.
- **Choose an Ending:** Next, you pick the ending part of the address, like ".com," ".org," or others. Choose the one that fits your website's purpose.
- **Register the Domain:** If your chosen name is available, you can register it. This means you're reserving that address for your website. You usually need to pay a fee to do this. Some domain registrars also offer hosting services, which is like getting a space to build your house (website).
- **Provide Information:** When you register, you'll give some information like your name, contact details, and payment info. This is like telling the city your name and phone number when you buy a house.
- **Complete the Purchase:** After providing the info and paying the fee, you'll usually have your domain. It's now officially yours, and you can start building your website at that address.

## CUSTOM EMAIL

After you purchase your domain, you can start to build trust with your customers by acquiring a professional email address at your domain, like `yourname@yourcompany.com` or group mailing lists, like `info@yourcompany.com`. Custom emails are also essential if you want to begin sending automated emails on behalf of your business. Automated emails, like auto response to newsletter sign-ups, typically get flagged for spam and never reach your customer if they come from non-custom email accounts like `yourname@gmail.com`. The automated systems think that you are sending an email on behalf of Google/Gmail, which flags it as fraud or spam which creates delivery issues as a result.

## VIRTUAL ADDRESS

Be careful with obtaining a virtual address for your business because they can set off red flags during the verification process and cause your application to be denied. Read more about virtual business addresses in the "Prep Work: Gathering the Tools, Supplies & Information You'll Need to Get Started" section.



## BUILD A SIMPLE WEBSITE

A well-designed website reflecting a contractor's capabilities is a powerful marketing tool that can significantly influence government agencies' decision to award contracts. You should have a website that accurately reflects your businesses capabilities and expertise. The key points regarding websites for government contractors are:

1. Make a strong first impression with a professional, visually appealing, and user-friendly website design.
2. Clearly communicate your expertise, qualifications, certifications, and successful past projects to demonstrate your ability to deliver quality work.
3. Show compliance with relevant regulations and standards to instill confidence in potential government clients.
4. Provide easy access to essential information like capabilities, contract vehicles, current clients, and past performance.
5. Emphasize strong past performance with case studies, quantifiable metrics, and testimonials to reinforce your reputation.
6. Optimize your website for search engines to increase visibility and discoverability by government procurement officers.
7. Incorporate user-friendly features like responsive design, clear navigation, and intuitive search functions for an optimal user experience.



Shameless plug, I lead a brand identity company called Wild Monkey. We can help you create all your brand visuals including your logo, business cards, website and hosting. If you need help with this part, visit our website at <https://wildmonkeybrand.com/> or give us a call at 214.601.1793

## BUSINESS LISTINGS

Business listings are vital for small businesses to increase online visibility and credibility, improve local SEO rankings, provide customers with critical business information, and ultimately drive more leads and sales from local search.

Business listings are important for small businesses and government contractors for several key reasons:

1. **Online Visibility & Discoverability:** Claiming and optimizing listings on popular online directories like Google My Business, Yelp, Facebook, etc. helps potential customers find the business easily when searching online. This increases the chances of the business being discovered by local customers.
2. **Building Business Credibility:** Having accurate, up-to-date listings with consistent information across multiple platforms lends credibility and legitimacy to the business. Customers are more likely to trust a business that maintains its online presence professionally.
3. **Providing Critical Business Information:** Listings allow businesses to showcase important details like business hours, contact information, products/services offered, photos, and customer reviews. This gives customers the information they need to decide to visit or make a purchase.
4. **Local SEO & Ranking:** Listings play a crucial role in local search engine optimization (SEO). Claiming listings and having consistent NAP (name, address, phone) data helps the business rank higher in local search results for relevant keywords.
5. **Analytics & Customer Insights:** Many listing platforms provide data on how customers engage with the listing, giving businesses insights into customer behavior and demographics to optimize marketing efforts.
6. **Driving Leads & Sales:** With listings effectively acting as online brochures or storefronts, they can directly drive leads and sales by attracting potential customers searching for businesses like theirs.

## BUSINESS LISTING WEBSITES

Here are the top business listing websites:

1. **Google My Business** - Google's official listing for local businesses to appear in Google Maps, Search, and other properties. <https://www.google.com/business/>
2. **Yelp** - Popular crowd-sourced review platform for businesses across multiple categories like restaurants, services, etc. <https://www.yelp.com>
3. **Facebook Pages** - Official Facebook presence for businesses to share updates, promotions, and connect with customers. <https://www.facebook.com/pages/>
4. **Apple Maps** - Apple's mapping service and business listings platform for iOS and Mac users. <https://mapsconnect.apple.com>
5. **Bing Places** - Microsoft's Bing search engine's directory of business listings and reviews. <https://www.bingplaces.com>
6. **Yellowpages.com** - One of the original online directories, allowing businesses to create enhanced listings. <https://www.yellowpages.com>
7. **Angie's List** - A review site focused on local service companies like contractors, movers, plumbers, etc. <https://www.angieslist.com>

## LISTING MANAGEMENT COMPANIES

You can make light work of getting your business listed on multiple listing sites by using listing management companies. Here are the top 5 local listing management companies, with their descriptions and URLs:

1. **Yext** - A leading digital knowledge management platform that allows businesses to manage their online listings, reviews, and other digital knowledge across over 100 services. <https://www.yext.com/>
2. **BrightLocal** - An all-in-one local marketing platform that helps businesses manage listings, track performance, generate leads, and build reputation through listings and reviews. <https://www.brightlocal.com/>
3. **Moz Local** - From the popular SEO software company Moz, Moz Local is a listing distribution and management solution for local businesses. <https://moz.com/products/local>
4. **SembCorp** - SembCorp provides automated local listing management and optimization services to drive more online visibility and customer engagement. <https://www.sembcorp.com/>
5. **SocialSEO** - In addition to local listing management, SocialSEO offers social media marketing, review generation, and other digital marketing services for local businesses. <https://www.socialseo.com/>



Note: Many local chambers of commerce have a business directory that lists each of the businesses that are part of their chamber. This could be a valuable resource in addition to the business listings mentioned within this guide.

# BUSINESS PLANNING

## DEVELOP A BUSINESS PLAN

A business plan is like a roadmap for starting and running a business. It's a detailed document that helps you figure out what you want your business to do and how you're going to make it happen.

Think of a business plan as a plan that you would make before going on a big trip. Just like you'd decide where you want to go, how you'll get there, and what you'll need, a business plan helps you decide what your business will offer, who your customers will be, and how you'll make money.

### **In a business plan, you'll include things like:**

- **Business Idea:** Describe what your business will do and what products or services you'll provide.
- **Market Analysis:** Learn about your competitors and your potential customers. This is like knowing who else is going on a similar trip and who might want to join you.
- **Marketing Strategy:** Decide how you'll tell people about your business and how you'll convince them to choose you. It's like planning how to share your exciting trip with others.
- **Organization and Management:** Figure out who will oversee what in your business. This is like deciding who's driving and who's reading the map during the trip.
- **Financial Plan:** Plan how much money you'll need to start and run your business. It's like calculating how much money you'll spend on the trip, including food, gas, and places to stay.
- **Revenue Plan:** Explain how you'll make money. Are you selling products, providing services, or something else? It's like deciding if you'll earn money by selling souvenirs during the trip.
- **Future Goals:** Set goals for where you want your business to go in the future. It's like planning what other exciting trips you want to take after this one.

Having a business plan helps you stay on track, make smart decisions, and demonstrate to others, like investors or lenders, that you have a clear idea of how your business will succeed. Just like a well-thought-out trip plan can make your journey smoother, a good business plan can help your business succeed and grow.

You don't have to finalize the business plan now. Create it using the general, high-level information outlined in this section. Make a draft version and add to it as you go. When questions come up that you cannot answer about your business, jot them down in your business plan draft, and find the support and resources to help you answer those questions later.

For example, what is your current and/or projected revenue for the next three, six, nine and twelve months? If you do not know the answer to that question now, don't worry. Write it down, and seek the assistance of the Small Business Development center for resources on how to create those projections for your business plan.

## BUSINESS PLANNING RESOURCES

- Here's a great resource for developing a business plan: <https://canvanizer.com/new/business-model-canvas>
- Here's a resource for developing a mission statement: <https://ramp.com/mission-statement-generator>

## DEVELOP AN OPERATING AGREEMENT

A business should develop an operating agreement when it is structured as a limited liability company (LLC). An operating agreement is a legal document that outlines the internal operations, ownership structure, and management of the LLC.

It is generally recommended to create an operating agreement as early as possible, ideally at the formation stage of the LLC. The operating agreement helps establish the rights, responsibilities, and obligations of the LLC's members (owners) and provides a framework for decision-making and dispute resolution.

### Developing an operating agreement early on offers several benefits:

- **Clarity & Structure:** An operating agreement provides clarity on how the LLC will be managed, how profits and losses will be allocated, and how major decisions will be made. It establishes the rules and procedures that govern the LLC's operations.
- **Legal Protection:** Having a comprehensive operating agreement can provide legal protection by clearly defining the rights and obligations of the LLC's members. It can help prevent misunderstandings, conflicts, and potential legal disputes among the members.
- **Bank & Investor Requirements:** If the LLC intends to seek financing or investments from banks, lenders, or investors, they often require a copy of the operating agreement. Having a well-drafted operating agreement in place demonstrates professionalism and a clear organizational structure, which can enhance the credibility of the business.
- **Dispute Resolution:** The operating agreement can include provisions for resolving conflicts or disputes among the members. By addressing potential issues in advance, the operating agreement can help prevent disputes from escalating and provide a mechanism for resolving them more efficiently.

While the operating agreement is not legally required in all states, having one is highly recommended for LLCs. It is essential to consult with a qualified attorney or legal

professional to ensure that the operating agreement is tailored to the specific needs and requirements of the business and complies with applicable laws and regulations.

## OPERATING AGREEMENT TEMPLATES

I recommend using the Non-Standard Operating Agreement Template below. If your certificate of formation says that your business is managed by **managers**, or pretty much anything other than "**managed by members**," you'll need to file Form 424 for a Certificate of Amendment with the Texas Secretary of State

If you decide to structure your business as outlined within the Non-Standard template, you'll also need to order new LLC Certificates. They can be ordered from anywhere, but I have ordered from TCS Liberty Legal for years and can vouch for their product as I was also referred to them by my mentor, the late Gordon Edwards at the Dallas Small Business Development Center.



Here's my Template: Non-Standard Operating Agreement Template

Keep in mind that the template is written to model the operating agreement of Ford Motor Company wherein the entity is managed by its **members**, ie. **Managing Members**.

The main difference between this template and that of a traditional operating agreement is the units of interest outlined in section 1.8 and in Exhibit B. These sections define the Class "A" and Class "B" Voting/Non-Voting Units of Interest. Ownership of the company is represented by the percent ownership of these units of interest. Depending on the class (A or B), one who owns units of interest may (or may not) be entitled to vote on matters of company business.

In this way, the template allows the entity to in effect operate as a publicly traded company while still being held privately. Functionally, you could use this operating agreement to exchange equity in your company (through the transfer of units of interest) with individuals and companies acting as investors in exchange for monetary contributions.

## PRIVATE PLACEMENT MEMORANDUM

After you have established the Non-Standard Operating agreement above, you'll need to put together your Private Placement Memorandum (PPM). A PPM is a securities disclosure document used by companies that engage in a private offering of securities. It outlines the material details about the securities offering. In our case, the securities offering are the units of interest in the company as defined within the new operating agreement and represented by the LLC Certificates to be exchanged for investor monies.



Here's my Private Placement Memorandum Template: Private Placement Memorandum

## DEVELOP YOUR CAPABILITY STATEMENT

What is a capability statement, why do you need it and when do you use it? A capabilities statement is a concise document that provides an overview of a company's or an individual's capabilities, qualifications, and expertise. It is typically used in business contexts, especially when seeking government contracts, applying for grants, or pursuing potential clients in the private sector.

The main purpose of a capabilities statement is to showcase the strengths and competencies of the entity (company or individual) in a clear and organized manner. It serves as a marketing tool, presenting key information that highlights the entity's unique selling points and how it can fulfill the needs of potential clients or contracting agencies.



Here's my Capability Statement Template: Sample Capabilities Statement.pdf

## NUMBERS FOR TAXES & CREDIT

### APPLY FOR A DUNS NUMBER

The DUNS (Data Universal Numbering System) number is a unique nine-digit identifier for businesses. The Federal Government uses the DUNS number to track how federal money is allocated. You'll need this to apply for government contracts.

You can apply for a DUNS number on the Dun & Bradstreet website at <https://www.dnb.com/duns-number.html>

If your organization does not yet have a DUNS number, or not sure what it is, please visit the Dun & Bradstreet (D&B) website or call 866-705-5711 to register or search for a DUNS number.



Congratulations! You just hit a milestone. Now that you have a DUNS Number, you can apply for Business Credit and monitor your business credit using Nav.com

## GET A TEXAS IDENTIFICATION NUMBER (TIN)

A TIN is issued by the Texas Comptroller of Public Accounts when you register your LLC with the Texas Secretary of State. The TIN serves as a unique identifier for businesses operating in the state of Texas for various tax-related purposes, including sales and use tax. It is used to track and administer taxes and permits in Texas. When applying for a Texas Sales and Use Tax permit or other tax-related permits, businesses may be required to provide their TIN.



Congratulations! You just hit a milestone. Now that you have an TIN, you can complete the steps necessary to obtain your Sales & Use Tax permit from the Texas Comptroller of Public Accounts

## TEXAS SALES & USE TAX PERMIT

Texas imposes 6.25% state sales and use tax on all retail sales, leases and rentals of most goods, as well as taxable services. A Texas Sales & Use Tax Permit authorizes your Texas based business to sell things or offer services and charge customers sales tax.

### HOW DOES THE SALES & USE TAX PERMIT WORK?

Imagine you're hosting a little stand to sell your homemade cookies. The permit is like the permission you need from the school to set up your stand in the hallway. In this case, the "school" is the state of Texas, and the "permission slip" is the Sales and Use Tax Permit.

When you sell things in Texas, you usually must charge your customers a little extra money called "sales tax." This tax helps the state pay for things like roads, schools, and other important stuff. To collect and send this tax to the state, you need the permit.

Getting the permit involves telling the state about your business and what you plan to sell. It's a way for the state to keep track of who's selling what and make sure everyone follows the tax rules.

So, just like you need that permission slip for your school project, businesses in Texas need the Sales and Use Tax Permit to sell things and collect sales tax. It's all about following the rules and helping the state run smoothly.

### HOW TO APPLY FOR A TEXAS SALES AND USE TAX PERMIT

You can apply for a Texas Sales and Use Tax permit, via eSystems online application on the Texas Comptrollers website.

If you are a sole owner, partner, officer or director and do not have a social security number, you cannot use the online application. Instead, you'll need to use form AP-



201, *Texas Application* (PDF). Once completed, email the application to [sales.applications@cpa.texas.gov](mailto:sales.applications@cpa.texas.gov) or fax the application to 512-936-0010. Anyone applying for a Texas Sales and Use Tax Permit must be at least 18 years of age. Parents or guardians can apply for a permit on behalf of a minor.

# **GOVERNMENT CONTRACTING**

# STARTING GOVCON & GRANT FOUNDATIONS

## CREATE A LOGIN.GOV ACCOUNT

Login.gov is a shared sign-in service that provides secure access to services from various U.S. government agencies with a single username and password. Once you set up an account, you can use it for a range of services such as applying for federal jobs or accessing Small Business Administration (SBA) resources.



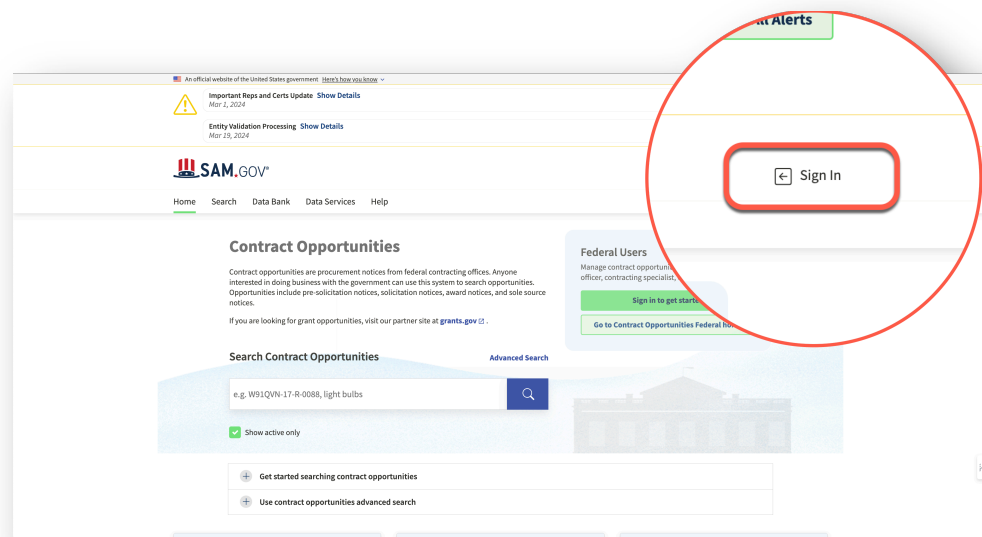
Note: You will need a Login.gov account to use multiple systems for your business, including registering for SAM.gov and applying for SBA certifications.

Before you can register on SAM.gov, you'll need to create a Login.gov account.

### HOW TO CREATE A LOGIN.GOV ACCOUNT

To create a Login.gov account, follow the steps below:

1. go to SAM.gov and click “sign in”



2. Next, accept the U.S. Government System terms to sign into SAM.gov by clicking the “Accept” button.



3. If you have a Login.gov account, you can use it to sign in on the next window. However, if this is your first time on the SAM.gov account, you likely do not have a Login.gov account, so you'll need to create one by clicking "create an account" on this screen:

LOGIN.GOV SAM.GOV

Diagram showing a user profile, a shield icon, and a login window.

sam.gov is using Login.gov to allow you to sign in to your account safely and securely.

**Sign in** **Create an account**

**Sign in for existing users**

**i** SAM.gov only recognizes one email address on Login.gov accounts. Adding email addresses to your Login.gov account [may cause your SAM.gov login to fail](#).

Sharing your Login.gov password or using someone else's Login.gov account violates the [rules of use](#).

Email address

Password

☐ Show password

**Sign in**

[Sign in with your government employee ID](#)

[Back to sam.gov](#)

[Forgot your password?](#)

[Security Practices and Privacy Act Statement](#)

[Privacy Act Statement](#)

- Next, enter your email address, preferred language, review and accept the Login.gov Rules of Use. Note that this is your personal login, not the company's login. Be sure that you enter an email address that you'll always be able to access. Once your account is created, you can add an additional email address to access your account.

Next, click "submit."

The screenshot shows the SAM.gov account creation interface. At the top, there are logos for LOGIN.GOV and SAM.GOV. Below the logos is a diagram showing a user profile, a shield with a checkmark, and a computer monitor, all connected by lines. The text states: "sam.gov is using Login.gov to allow you to sign in to your account safely and securely." There are two buttons: "Sign in" and "Create an account". Below this is the heading "Create an account for new users". The form includes a field for "Enter your email address" with the placeholder "name@email.com", marked with a red callout "1". Below this is a section for "Select your email language preference" with the text "Login.gov allows you to receive your email communication in English, Spanish or French." There are three radio button options: "English (default)", "Español", and "Français", marked with a red callout "2". Below the language options is a checkbox labeled "I read and accept the Login.gov Rules of Use" with a link to the rules, marked with a red callout "3". At the bottom of the form is a blue "Submit" button, marked with a red callout "4". Below the form are links for "Cancel", "Security Practices and Privacy Act Statement", and "Privacy Act Statement".

1

2

3

4

5. Check your email for a message from Login.gov.
6. Click the **“Confirm your email address”** button in the message. This will take you back to the Login.gov website.



## Confirm your email

Thanks for submitting your email address. Please click the link below or copy and paste the entire link into your browser. This link will expire in 24 hours.

**Confirm email address**

[https://secure.login.gov/sign\\_up/email/confirm?\\_request\\_id=](https://secure.login.gov/sign_up/email/confirm?_request_id=)

Please do not reply to this message. If you need help, visit [login.gov/help](https://login.gov/help)

[About Login.gov](#) | [Privacy policy](#)

Sent at

7. Create your Login.gov password -
8. Set up a second layer of security.
9. As an added layer of protection, Login.gov requires you set up an authentication method to keep your account secure. This is referred to as multi-factor authentication (MFA).
10. Once you have authenticated, you have successfully created your Login.gov account. This means that you have “Signed up” for an account and set up a profile on SAM.gov. Your SAM.gov account credentials are managed by login.gov.

11. You will be taken to SAM.gov.



Congratulations! You just hit a milestone. Now that you have an Login.gov account, you can now log into SAM.gov and start your application for a Unique Entity ID (UEI).

## CREATE AN ID.ME ACCOUNT

ID.me is a digital ID card that works like a passport to give you verified access many government benefits and services, including the IRS, Social Security Administration, US Department of Veterans Affairs and most notably for this book, SAM.gov.

Before you can register on SAM.gov, you'll need to create an account with ID.me. This service verifies your identity and ensures the security of your information.

## REGISTERING YOUR ENTITY TO OBTAIN A UNIQUE ENTITY ID

Once your Login.gov account is set up and access to your SAM.gov account is secured, the next crucial step is to obtain a **Unique Entity ID (UEI)** from SAM.gov. This identifier is essential for the government to track and recognize your business or personal entity.

Entity registration is mandatory to participate in activities like bidding on government contracts or applying for federal aid such as grants and loans.

Entity registration is the process of providing information about yourself or your organization so the government can verify you are a legitimate entity that can apply for government contracts or assistance. SAM.gov verifies that individuals and organizations



are not fraudulent and that they have a physical location where they live or conduct business.

The entity registration area of SAM.gov is where the federal government manages information on potential government business partners or federal financial assistance recipients.

You register your entity to do business with the U.S. federal government by completing the entity registration process at SAM.gov. Your active registration in SAM.gov provides your entity the ability to apply for federal grants or loans or bid on government contracts.



Note: Registration does not guarantee business with the federal government.

The registration process on SAM.gov includes the assignment of your Unique Entity ID, allowing you to operate as a prime awardee for federal projects. If you want to apply for federal awards as a prime awardee, you need a **registration**.

Entity Registration in SAM.gov is required by federal procurement policy and financial assistance policy if the entity is applying for, or has received, federal prime awards. Federal policy requires direct (i.e. first-tier) subcontractors and subrecipients to have a Unique Entity ID. Federal policy does not require those subcontractors or subrecipients to complete a SAM.gov entity registration.



**Note:** “Registering” means registering an entity to do business with the government on SAM.gov. This process is different than “signing up” via Login.gov. You must **sign up** AND sign in to your SAM.gov account via Login.gov to use many of the features of SAM.gov, such as saving searches, following records, or viewing standard reports. However, You must register your entity (you as an individual or your organization) to be able to bid on contracts or apply for federal assistance (e.g., grants, loans) from the federal government.

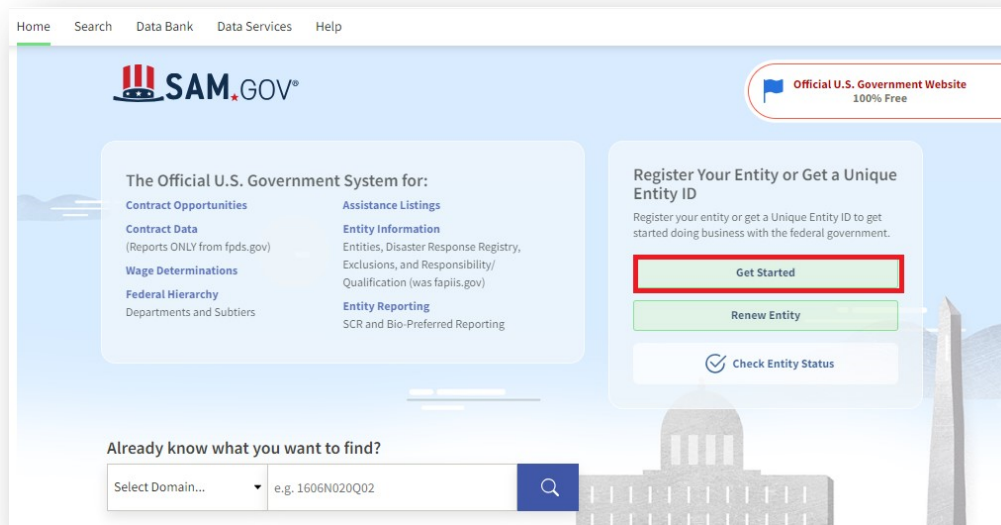
## HOW TO REGISTER AND SECURE A UNIQUE ENTITY ID

There is some prep work involved with registering an entity in SAM.gov. Before you start your registration, make sure you have all required information. SAM requires data and documentation.

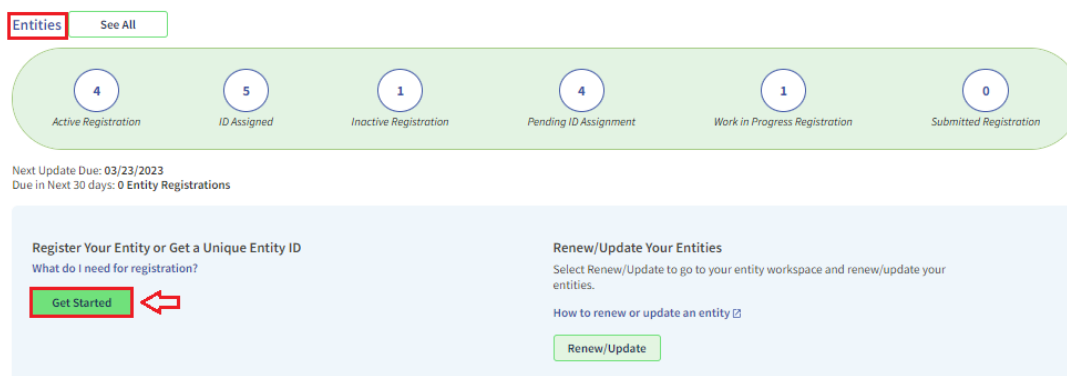
- **Documents Requirement:** The FSD has produced the Entity Validation Document Requirements document. This one-pager tells you which documents to provide.
- **Data Requirement:** Depending on the type of registration you need, you will want to have the required data handy.

When you have your required documents and data handy, follow the steps below to register your entity in SAM.gov which will result in obtaining your Unique Entity ID (UEI).

1. Select **Get Started** directly from the home page.



2. In the Workspace, Find the **Entities** widget and select **Get Started**.



3. When the welcome screen appears informing you that you will be asked a few questions to help determine the best registration option for your needs, select the **Create New Entity** button.

**Welcome**

You are about to create a new entity record.

We will ask a few short questions to help us recommend the best option for you.

**Create New Entity**

**Are you trying to update an existing entity record?**

Please go to your Workspace and select the "Renew/Update" button for that entity.

**Go to Workspace**

**Is your entity based outside of the United States?**

You must get an NCAGE Code before starting a registration. Go to the [NCAGE Request Tool](#) to submit a request.

**What do I need for registration?**

**Download Guide**

4. Select the answer to the following questions that best suits your needs and select **Next**.

**Note:** The purpose of registration questionnaire is only to be used as a suggestion tool based on the options you choose. There is no definitive right or wrong answer.

**What is your goal?**

I want to do business...(Select the option most relevant to you)

☐ Directly with the U.S. federal government.

☐ With a business or other organization which receives funds directly from the U.S. federal government.

☐ Other.

Previous
 Cancel
 Next

- a. The questions that follow will vary based on your selection to the previous question.

## What is your goal?

I want to do business... (Select the option most relevant to you)

- ☐ Directly with the U.S. federal government.
- ☒ With a business or other organization which receives funds directly from the U.S. federal government.
- ☐ Other.

 Select the answer that best fits your intentions today:

- ☒ Provide goods or services as a federal subcontractor. [?](#)
- ☐ Receive a subaward under a federal grant/financial assistance program. [?](#)
- ☐ Apply as a direct vendor for federal funds distributed by a government entity other than the federal government. [?](#)  
(e.g. state, local, tribal, territorial)
- ☐ Apply as a grantee for federal funds distributed by a government entity other than the federal government. [?](#)  
(e.g. state, local, tribal, territorial)
- ☐ Just browsing. I don't have anything specific in mind today, but might be interested in future work with organizations who receive funds directly from the U.S. federal government.
- ☐ Participate in, or apply for, other programs. Please describe.  
Please specify

e.g. Program Name

123 characters allowed

    
Previous Cancel Next

b. "Who required your entity to be in SAM.GOV?"

### Who required your entity to be in SAM.GOV?

Only select the primary source.

☐ Federal government

Federal Hierarchy (Optional)

☐ U.S. state or territory government or office

☐ Local government office, i.e., of a county or a city

☐ Tribal government or office

☐ A company or business

☐ Hospital system or healthcare organization (for profit or non-profit)

☐ Non-profit organization

☐ University or research facility (for profit or non-profit)

☐ Industry group, professional association, trade publication, etc.

☐ Procurement Technical Assistance Center (PTAC) or PTAC office

☐ I decided on my own

☐ None of the above  
Please specify

e.g. Program Name

123 characters allowed

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×

>

Previous

Cancel












Next

You are prompted to select what you want to do with your entity registration with a recommendation based on your answers to the previous questions. Choose the **Select** button below one of the options to proceed.

## Choose an Option

It looks like you intend to do business directly with the U.S. federal government on a procurement opportunity as a prime contractor. We recommend you choose **All Awards**.

This option also allows you to pursue financial assistance directly from the U.S. federal government.

	Recommended		
	Unique Entity ID Only	Financial Assistance	All Awards
<b>What you get:</b>			
Unique Entity ID 	✓	✓	✓
Entity Available in Search 	✓	✓	✓
CAGE Code 	—	✓ (For some entities)	✓
<b>When you need it:</b>			
To receive an award from someone else receiving federal funds 	✓	✓	✓
To apply directly for federal grants or loans 	—	✓	✓
To bid on federal contracts (prime) 	—	—	✓
<b>What you must complete:</b>			
Entity Validation 	✓	✓	✓
IRS Taxpayer Validation 	—	✓	✓
CAGE/NCAGE Validation 	—	✓ (For some entities)	✓
Level of Effort 	Lowest	Medium to High	Highest
Expiration 	—	1 Year	1 Year
	Select	Select	Select



Download Your Registration Guide

Download Guide



Previous




Cancel

- You are asked, "Are you registering a government entity?" Select **No** and click **Next**.

### Are you registering a government entity?

Select Yes if you are registering an official organization, department, or institution of a U.S. state, U.S. local, U.S. tribal, or foreign government.

☐ Yes ☐ No



If you are unsure whether you are registering a government entity, check with your government authorities to confirm. Each government determines for itself what qualifies as a government entity. Private companies with a public mission generally do not qualify.

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×

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Previous

Cancel

Next

6. You are asked, "Do you have a CAGE code? If you are will be bidding on procurement contracts, a CAGE is required. If you are new to SAM.gov, you likely do not have a CAGE code. In that case, Select **No**, and click **Next**. You'll receive your CAGE code through the registration process.

## Do you already have a CAGE code?


The Commercial and Government Entity (CAGE) code is a five-character, alpha-numeric identifier assigned to entities located within the United States and its outlying areas by the Defense Logistics Agency (DLA) CAGE Program. All registrations go through CAGE Code assignment and validation.

The CAGE code is different from the Unique Entity ID assigned in SAM.gov. It is used by the federal government for procurement and acquisition processes, like invoicing or pre-award verification.

☒ Yes, and I can provide:

**Provide CAGE Code**

☐ No, the entity does not have a CAGE code and will receive one through the registration process.

    
Previous Cancel Next

7. On the next screen, your selections are displayed. Confirm your information is accurate and click **Next**.



## You will be registering the following:



Entity Type:  
**Business or Organization**



A business or organization is any entity that does not qualify as a government entity (state, local, tribal, or foreign).



Purpose of Registration:  
**All Awards**



Bid on federal contracts and other procurements, as described by the Federal Acquisition Regulation (FAR) [🔗](#).

Apply for grants and loans, as described by 2 CFR 200 [🔗](#).



**What do I need for registration?**  
Download our guide.

**Download**



Previous



Cancel



Next

8. The **Prepare Your Data** screen displays. Review the list of sections required to be completed based on whether you previously selected you would like to register for financial assistance or all awards. If you intend to bid on contracts, select **All Awards** and click **Next**.

## Prepare Your Data

For registration, you are required to enter a lot of information about your entity. View a comprehensive guide to what you need for registration here before starting.

Purpose of Registration:  
**All Awards**

**What do I need for registration?**  
Download our guide.

Download

ID

Core Data

Points of Contact

Assertions

Representations & Certifications

To register for **All Awards**, complete the following sections.

If you are registering an entity based outside of the United States, you must get an NCAGE Code before starting a registration. [Go to NCAGE Request](#) Tool to submit a request.

<

x

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Previous

Cancel

Next

- When the **Enter Entity Information** screen displays, enter your information and select **Next**.

#### Definitions:

- Legal Business Name ([KB0058175](#)).
- Doing Business As (Optional)
- Physical Address ([KB0058176](#)).
- Country: If the "Next" button does not highlight, remove this field and re-enter.

**Zip Code +4:** When you fill in the Zip Code, the city and state will populate automatically.

## Enter Entity Information

All the following information will be used to validate your entity, unless marked as optional.

### Legal Business Name

If you are acting on behalf of a limited partnership, LLC, or corporation, your legal business name is the name you registered with your state filing office.

This field is required

### Doing Business As (Optional)

Doing business as is the commonly used other name, such as a franchise, license name, or acronym. Leave blank if not applicable.

### Physical Address

Your physical address is the street address of the primary office or other building where your entity is located. A post office box may not be used as your physical address.

#### Country

#### Street Address 1

#### Street Address 2 (Optional)

#### ZIP Code

#### City

#### State / Territory



10. Proceed through the validation process. For more information on validation, see [this article \(KB0058402\)](#).



Congratulations! You just hit a milestone. Now that you have an UEI, you can certify your business with the SBA, and set up an account with [grants.gov](https://grants.gov)

## WORKING THROUGH THE VALIDATION PROCESS

The new process for entity validation involves providing information in SAM.gov, where the Entity Validation Service (EVS) reviews it. This includes verifying entity existence and uniqueness. The process includes steps such as entering entity information, assessing search results, and addressing any discrepancies. Depending on the outcome, you may proceed with registration or await resolution after submitting documentation to the EVS.

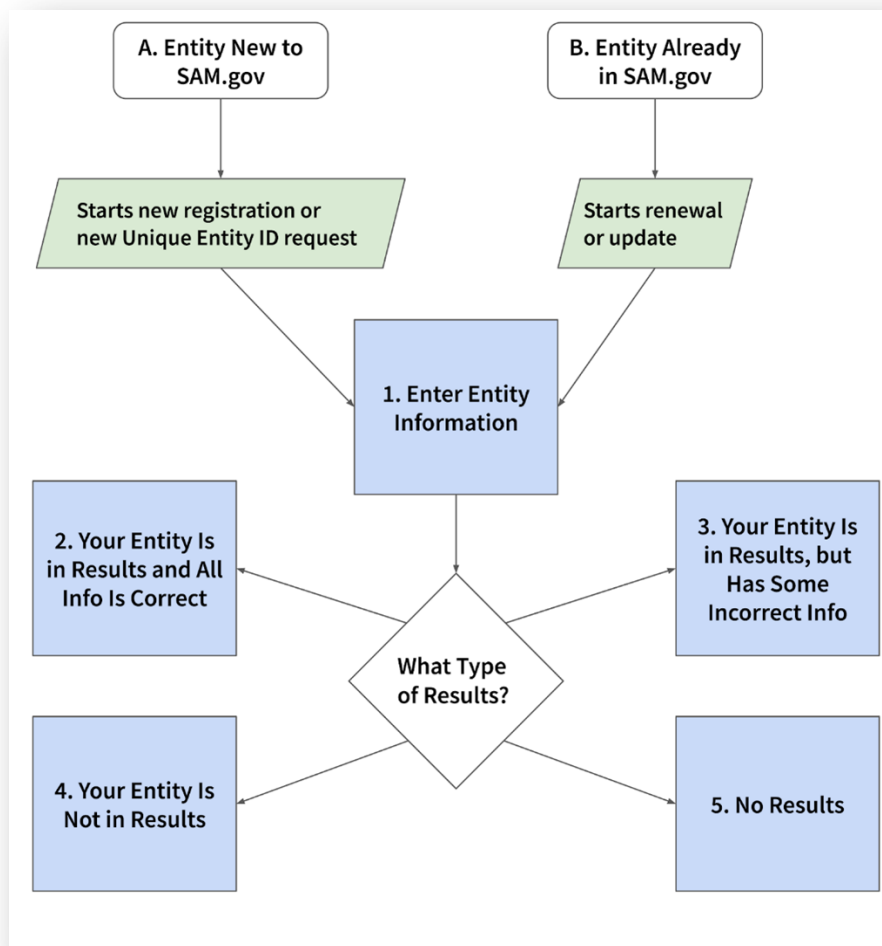


Figure 1 Entity Validation Process

## COMPLETE ENTITY REGISTRATION & OBTAINING CAGE CODE

Once you've created an ID.me account and acquired a Unique Entity ID (UEI), you'll need to complete your registration on SAM.gov. Completing your registration is completely free and it will allow you to receive a CAGE (Commercial and Government Entity) code. The CAGE code makes you eligible for government grants and contracts.

11. you are asked to enter your relationship to the entity you are registering (KB0067413). Indicate whether or not you are an employee or officer of the entity, then select Next.

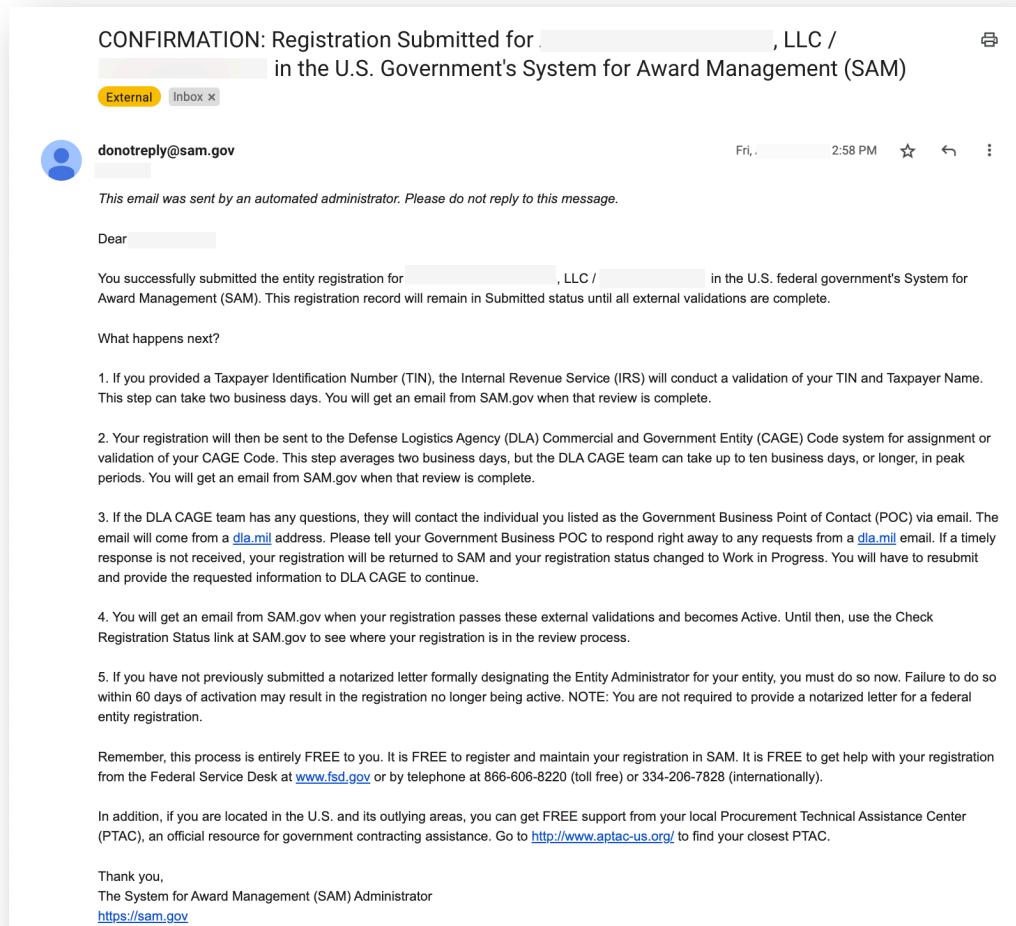
### SECTIONS OF THE ENTITY REGISTRATION FORM

If you are directly affiliated with the entity, you will see the **Registration Overview** page listing each section of the registration process. This part of the registration should take approximately 45 minutes if you have all the required documents and data.

Let's walk through each step of the Entity Registration together. First, visit <https://www.sam.gov/SAM/> to begin the entity registration process. Make sure to complete all sections of your entity's registration in SAM.gov.

12. Complete each of the following sections (as applicable):
  - a. Core Data
    - i. Business & TIN Information
    - ii. CAGE/NCAGE Code
    - iii. General Information
    - iv. Financial Information
  - b. Assertions (not required if registering for federal assistance opportunities only)
    - i. Goods & Services
    - ii. Size Metrics
    - iii. EDI Information
    - iv. Disaster Response Information
  - c. Representation and Certifications
    - i. Read Only Provisions
    - ii. User Completed Provisions
    - iii. Grants Certifications
  - d. Points of Contact (POCs), including optional POCs (you may remove optional POCs if they are no longer relevant.)
    - i. Mandatory Points of Contact
  - e. Small Business Certification
13. If you qualify as a small business, update your information in the Small Business Administration's (SBA) Dynamic Small Business Search (DSBS) or apply for a small business certification. For more information about small business certifications, see the Getting Certified section of this guidebook.

14. After you review the entire registration, select **Submit** on the **Entity Review** page.
15. When you select **Submit**, you will see a confirmation on the screen that you have successfully submitted your registration. You will also receive a confirmation email.



*Snapshot 1 Sam.gov Confirmation of Registration Submission Email*



Congratulations! You just hit a milestone. you have successfully submitted your registration. Your registration update will go through IRS verification and CAGE verification if applicable.

## AFTER SUBMITTING YOUR ENTITY REGISTRATION

After submitting your entity registration on SAM.gov, the record will remain in submitted status until all external validations are complete.

The SAM.gov registration process involves two parts, 1.) The IRS Validates your entity and 2.) The Defense Logistics Agency (DLA) reviews registration. After review, the DLA

issues the CAGE code which makes businesses eligible to apply for federal grants and contracts.

Here's what that looks like:

<b>2 BUSINESS DAYS</b>	<b>IRS Validation</b> If you provided a Taxpayer Identification Number (TIN), the Internal Revenue Service (IRS) will conduct a validation of your TIN and Taxpayer Name. This could take two business days. You will get an email from @sam.gov when that review is complete.
<b>2 BUSINESS DAYS</b>	<b>DLA Review</b> Your registration will then be sent to the Defense Logistics Agency (ULA) Commercial and Government Entity (CAGE) Code system for assignment or validation of your CAGE Code. This also is a FREE service. This step averages two business days, but the DLA CAGE team can take up to ten business days, or longer, in peak periods. You will get an email from @sam.gov when that review is complete.  If the DLA CAGE team has any questions, they will contact the individual you listed as the Government Business Point of Contact (POC) via email. The email will come from an @dla.mil address. Please tell your Government Business POC to respond right away to any requests from an @dla.mil email. If a timely response is not received, your registration will be returned to SAM and your registration status changed to Work in Progress. You will have to resubmit and provide the requested information to DLA CAGE to continue.

SAM.gov registration could take 10-15 business days to process. While you are waiting, select Check Status on the SAM.gov homepage to see where your registration is in the review process.

If you notice your registration has been submitted for 15 business days or longer, verify the status of your entity in your Workspace and use the **Check Status** button on the home page of SAM.gov to see if both display the same submitted status:

If they are the same- Contact CAGE to inquire about your processing status at 877-352-2255.

If the statuses conflict, for example, the Workspace shows submitted but status tracker shows differently - contact the Federal Service Desk .

It has been my experience that, after being issued a UEI, calling the Federal Service Desk (FSD) (SAM.gov's customer support line) to inquire about the status of your registration will help expedite the registration process.

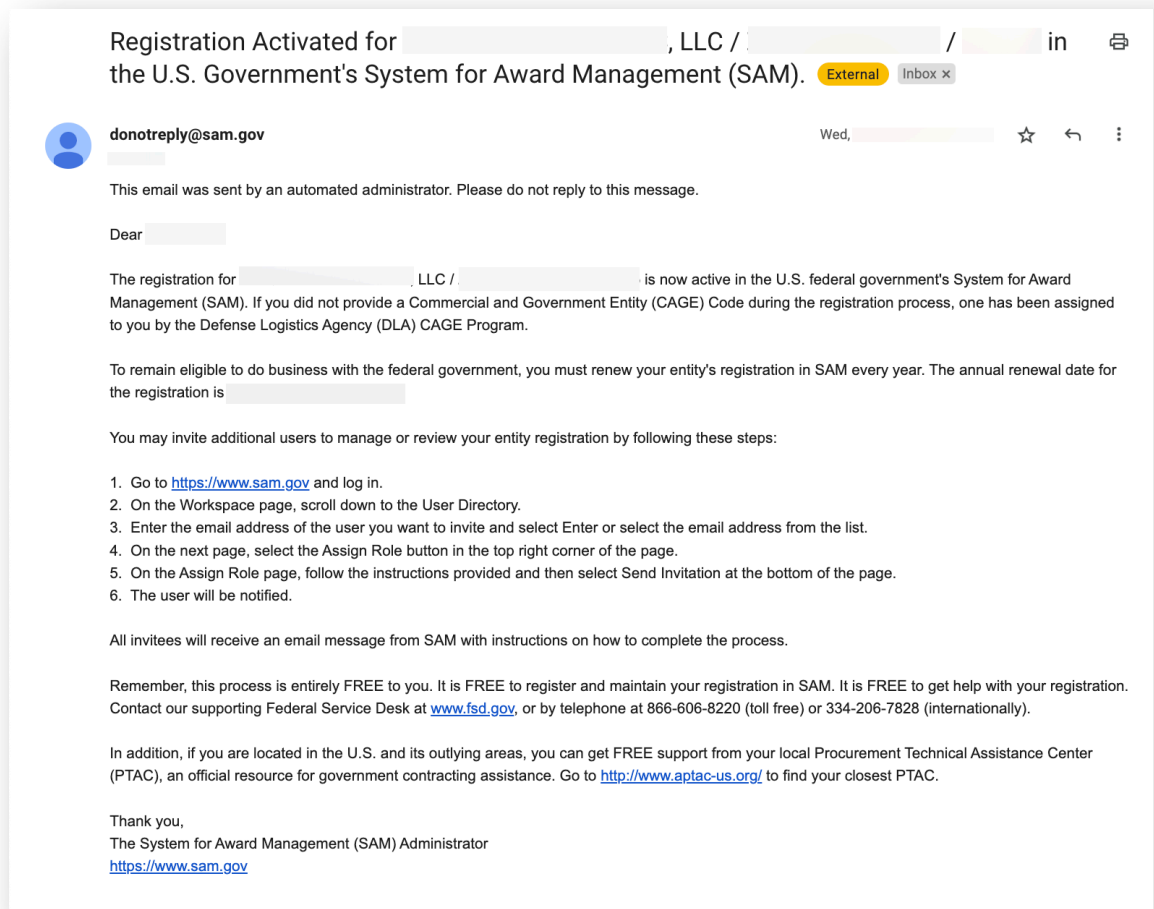



Note: After submitting your SAM.gov registration, the DLA CAGE team might send you an email asking for clarification regarding your LLC (this could be because there is another business with the same or similar name for their LLC in another state, or other circumstance requiring clarification). Simply respond to the email with the requested information.

If you get an email from any address that does not end in gov or .mil, be cautious. If you get an email, text message, or phone call asking for money or payment or any amount, be very cautious. These parties do not represent the U.S. government. You engage third party vendors at your own risk.


You will get an email from @sam.gov when your registration passes these external validations and becomes Active.







**Note:** It can take an additional 24-48 hours once activated in SAM.gov for the registration information to be available in other government systems.



Congratulations! You just hit a milestone. The issuance of your CAGE code signifies your eligibility to bid on federal contracts and unlocks access to new growth opportunities in government procurement.

## ACTIVE ENTITY REGISTRATION

Now that your business is eligible to bid on federal contracts, there are a few things to keep in mind to ensure that you maintain your eligibility and increase the likelihood of winning procurement opportunities.

- **Annual Renewal:** Remember to renew your SAM registration annually by the specified date within your activation email to maintain eligibility for federal contracts. Mark the calendar for annual registration renewal.

- **Assistance:** Be aware that registration and support are free, and you can access additional assistance at no cost. Utilize the Federal Service Desk and local Procurement Technical Assistance Center (PTAC) for free support with registration and government contracting processes.

# GOVERNMENT CONTRACTING OVERVIEW

## LEVELS OF GOVERNMENT CONTRACTING

Government contracting occurs at multiple levels, each with its own set of regulations, procedures, and opportunities. The main levels of government contracting in the United States are federal, state, and local.

### FEDERAL GOVERNMENT CONTRACTING

Federal government contracting involves businesses providing goods, services, or construction projects to federal agencies. This level of contracting often has more extensive regulations and requirements due to the size and complexity of federal projects. Federal contracts can range from small purchases to large-scale infrastructure projects.

Contracts with federal agencies are governed by the Federal Acquisition Regulation (FAR) and are typically administered by agencies such as the General Services Administration (GSA).

### SLED CONTRACTING

SLED contracting refers to the process of government procurement at the state, local, and education (SLED) levels. It encompasses the acquisition of goods, services, and construction projects by state governments, local municipalities (cities and counties), and educational institutions, such as K-12 schools and universities. SLED contracting is like federal government contracting but occurs at the state and local levels, involving a wide range of agencies and organizations.

#### Key features of SLED contracting include:

- **Diverse Entities:** SLED contracting involves a diverse range of government entities, each with its own procurement rules and regulations. These entities can include state agencies, city governments, county governments, school districts, and universities.
- **Varied Requirements:** SLED contracts can cover a wide array of goods and services, such as technology, construction, healthcare, transportation, consulting, and more, depending on the specific needs and priorities of the government entity.
- **Regulations and Guidelines:** Each state and local government has its own procurement regulations and guidelines, which contractors must adhere to when bidding for contracts. These regulations can vary significantly from one jurisdiction to another.
- **Competition:** SLED contracting often involves competitive bidding processes, where vendors and contractors submit proposals in response to requests for proposals (RFPs) or requests for bids (RFBs). These competitive processes aim to ensure fairness and transparency in awarding contracts.
- **Local Economic Impact:** SLED contracting can have a significant impact on the local economy, as it often prioritizes contracting with local businesses to stimulate economic growth and create jobs within the community.

- **Funding Sources:** SLED contracts are typically funded through state and local budgets, as well as grants and other sources of revenue specific to each government entity. For this reason, SLED contracts are typically unaffected by federal budgeting. Consider pursuing SLED contract opportunities to diversify your portfolio and ensure continued business in the event of government shutdowns.
- **Compliance and Reporting:** Contractors working with SLED entities must comply with various reporting and accountability requirements, including ensuring fair labor practices, diversity and inclusion initiatives, and other contractual obligations.

Overall, SLED contracting plays a crucial role in delivering essential services to communities and supporting economic development at the state and local levels, making it an important part of the government procurement landscape alongside federal contracting.

### State Government Contracting

State government contracting involves working with state agencies to provide goods and services. Like federal contracting, state-level contracts can vary in size and scope. Each state has its own procurement regulations and processes, and these can differ significantly from one state to another. State-level contracts are generally managed by each state's respective procurement office.

In the state of Texas, the procurement and contracting process is overseen by the Texas Comptroller of Public Accounts. The specific agency responsible for managing state-level contracts is the Texas Procurement and Support Services (TPASS), which operates under the Texas Comptroller's office. TPASS is responsible for overseeing procurement, contracting, and purchasing activities for various state agencies and entities in Texas. They establish procurement policies, manage contracts, and provide resources for vendors interested in doing business with the state of Texas.

### Local Government Contracting

Local government contracting involves working with city, county, and municipal governments to provide goods and services. Local contracts can include anything from road maintenance to IT services for city offices. Just like state and federal levels, local government contracting also comes with its own unique rules and procedures that are determined by local ordinances and regulations.

# FEDERAL GOVERNMENT CONTRACTING

## FEDERAL CONTRACTING OPPORTUNITIES

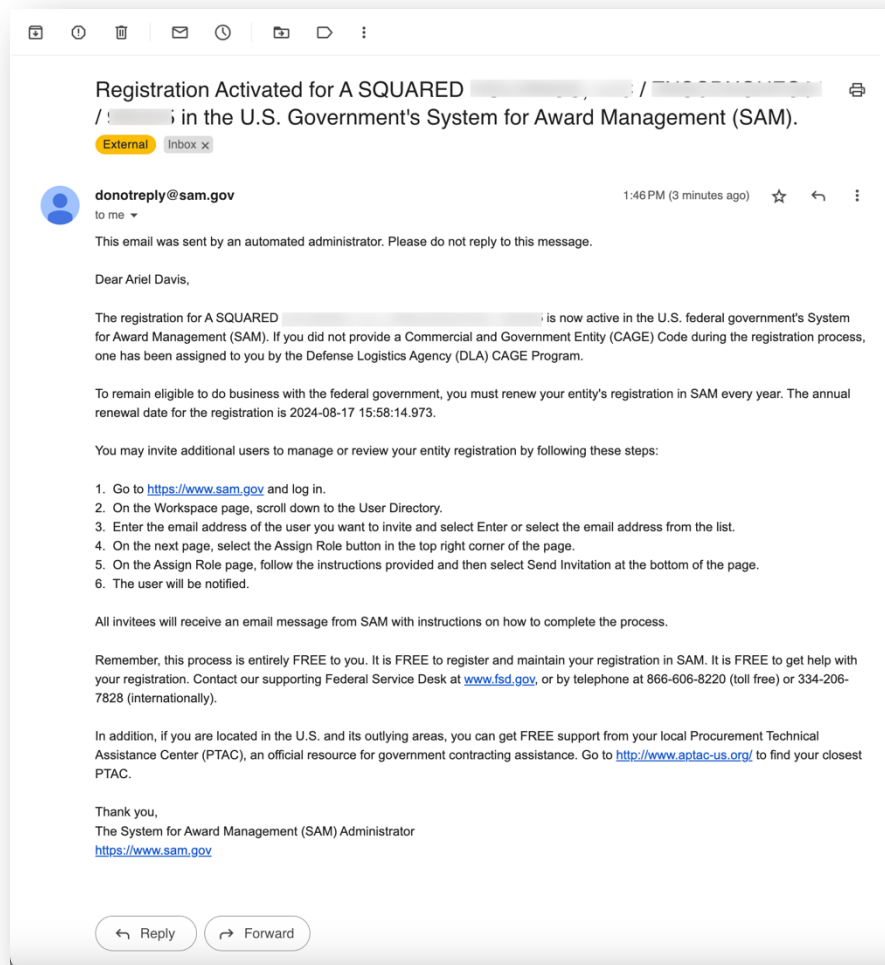
To bid on contracting opportunities with federal agencies such as the Department of Veteran Affairs, the Department of Defense, General Services Administration and the Department of Housing and Urban Development, you must first register on SAM.gov.

### REGISTERING ON SAM.GOV

It is 100% free to sign up to bid on contracting opportunities with the federal government. In order to enroll with the Federal Government, you'll need to access their system at <https://www.sam.gov/>. This process can also make you eligible for government grants.

Following the completion of the requisite information, it is essential to obtain your DUNS Number from Dun & Bradstreet. Subsequently, an approximate waiting period of one week is to be anticipated for the allocation of a "CAGE Code." Receipt of your CAGE code indicates that your application process has entered its review stage.

After you receive your CAGE code, during the data submission phase, it is advisable to perform self-identification as both a Women Owned Small Business and a Minority Owned Business if applicable. Following this step, it is recommended to proceed with the registration process as a Women Owned Small Business (WOSB) through the Small Business Administration (SBA), if applicable.



*Snapshot 2 Sam.gov Active Registration Confirmation Email*

## WORKING WITH SPECIAL FEDERAL AGENCIES

Some federal agencies have procurement processes that are different than most. These agencies include:

- US Department of Veteran Affairs
- DLA

### US DEPARTMENT OF VETERAN AFFAIRS

The US Department of Veteran Affairs (VA) operates a nationwide system of hospitals, clinics, VISN, data processing centers, and National Cemeteries which require a broad spectrum of goods and services. The VA purchases these goods and services on a national, regional, and local level. Regardless of how large or small your business is, the VA is a potential customer.

The VA purchases most of its requirements for direct delivery through its local or Regional Procurement Office (RPO). You are encouraged to contact each facility for inclusion in its procurement process.

## Regional Procurement Offices (RPOs)

The RPOs are subdivided into Network Contracting Offices (NCO). The NCO's share the same identifying number as the Veterans Integrated Service Networks (VISN) they are located in. Each NCO provides local, regional, and national procurement support toward providing the best possible care and support to our Veterans.

More Information about RPO's and NPO's can be found here:

<https://www.va.gov/plo/about/saos.asp>

## Regional Procurement Office Map



Some of the VA's regional procurement offices include:

- **Veterans Health Administration (VHA) Office of Procurement, Acquisition, and Logistics (OPAL):** The VHA is responsible for the health care services provided to eligible veterans. The OPAL oversees the procurement activities for medical supplies, equipment, and services needed by VHA facilities. The VHA has multiple regional offices across the country, each responsible for specific areas.
- **VHA Network Contracting Offices (NCOs):** The VHA is divided into several geographic networks, each with its own Contracting Office. These offices handle procurement needs for VHA facilities within their respective regions.
- **VHA Technology Acquisition Center (TAC):** The TAC manages IT and technology-related acquisitions for the VHA. It oversees contracts for IT services, software, hardware, and other technology solutions.
- **National Cemetery Administration (NCA) Office of Acquisition and Materiel Management:** The NCA is responsible for maintaining national cemeteries and providing burial services for eligible veterans. Its Acquisition and Materiel

Management office handles procurement for cemetery-related goods and services.

- **Veterans Benefits Administration (VBA) Office of Acquisition and Logistics:** The VBA is responsible for administering benefits and services to veterans and their families. The Office of Acquisition and Logistics manages procurement activities for the VBA.
- **Office of Construction and Facilities Management (CFM):** This office is responsible for construction and facilities-related projects for VA facilities. It handles procurement for construction services and facility maintenance.

## STATE & LOCAL GOVERNMENT CONTRACTING (TEXAS)

To register for contracting opportunities at the state and local levels, you'll want to register where those agencies post their solicitations. To register for state level opportunities in Texas, you'll need to go through the Texas Procurement and Support Services (TPASS). For local opportunities, you can focus on setting up an account with Bonfire and other bid boards.

### STATE CONTRACTING OPPORTUNITIES

The CMBL serves as a database for manufacturers, suppliers, and vendors seeking to offer materials, equipment, supplies, and services to the state of Texas. By registering on the CMBL, entities gain access to bidding opportunities. The CMBL is utilized by Texas state purchasing bodies to create a vendor mailing list, allowing vendors to receive bids aligned with their offered products or services.

#### How to Register for CMBL

To register for contracting opportunities at the state of Texas, you'll need to go through several steps. Here's a general guide to the process:

**Create a Vendor Profile** - Start by creating a vendor profile in the state's Centralized Master Bidders List (CMBL) system. The CMBL is a database of vendors interested in doing business with the state. You can register online on the Texas Comptroller's Electronic State Business Daily (ESBD) website.

<https://comptroller.texas.gov/purchasing/vendor/>

**Complete Required Information** - When registering, you'll need to provide information about your business, such as its legal name, address, contact information, business type (e.g., sole proprietorship, corporation), and relevant industry codes. You'll also need to specify the goods or services you offer.

**Certifications & Designations** - If your business qualifies for any certifications or designations (e.g., Historically Underutilized Business - HUB, Small Business), you can provide this information during registration. These certifications can provide advantages in the contracting process.



**Search for Opportunities** - Once registered, you can search for contracting opportunities on the ESBD website. This platform lists current solicitations and contract opportunities from various state agencies.

**Submit Bids or Proposals** - When you find an opportunity that aligns with your business, you'll need to submit bids or proposals according to the instructions outlined in the solicitation documents. This may include providing pricing details, project plans, and other required information.

**Award Process** - If your bid is successful, you'll be awarded the contract. The award process may involve negotiations and finalizing contract terms.

**Contract Management** - Once awarded a contract, you'll need to manage the contract according to its terms and deliver the goods or services as specified.

Registering on CMBL incurs a yearly fee of \$70, which can be paid online or by check. Registration is optional, and it's suggested to inquire with state agencies about their utilization and assessment of the CMBL.

### Additional Links

- Texas Statewide HUB System: <https://texashub.gob2g.com/>
- CMBL Overview: <https://comptroller.texas.gov/purchasing/vendor/cmb/>
- CMBL Application: <https://security.app.cpa.state.tx.us/>



**Note:** Always stay up-to-date with changes in procurement policies, solicitations, and deadlines. Regularly check the Texas Comptroller's website and other relevant sources for the latest information on state-level contracting opportunities in Texas.

## LOCAL CONTRACTING OPPORTUNITIES

Some state and local government agencies post their contracting opportunities on procurement portals. A procurement portal is a software platform designed for procurement and sourcing (similar to SAM.gov which is used for federal contracting). One of the most popular procurement portals is GoBonfire. It is used by many state and local organizations, including government agencies, educational institutions, and corporations, to streamline their procurement processes, manage supplier relationships, and facilitate sourcing activities.

## PROCUREMENT PORTALS

Each state and local organization has its own separate procurement portal. Often times, these procurement portals are powered by GoBonfire but they can also be housed using other providers. For this section, we will be focusing on GoBonfire procurement portals.

### Here are a few State, Local & Education procurement portals:

- Texas SmartBuy Marketplace - <https://www.txsmartbuy.com/>
- Texas Comptroller of Public Accounts - Centralized Master Bidders List  
<https://comptroller.texas.gov/purchasing/vendor/cmbli/>
- Texas Electronic State Business Daily - <http://www.txsmartbuy.com/esbd/>
- Texas Department of Transportation - Electronic State Business Daily  
<https://www.txdot.gov/inside-txdot/division/construction/esp/esp.html>
- Texas General Land Office - Procurement and Contracting Opportunities  
<https://www.glo.texas.gov/the-glo/procurement/>
- Texas Health and Human Services Commission - Contract and Procurement Services  
<https://hhs.texas.gov/about-hhs/doing-business-hhs/contract-and-procurement-services>
- University of Texas System - Procurement and Strategic Sourcing  
<https://www.utsystem.edu/offices/procurement>
- Texas A&M University System - Procurement Services  
<https://www.tamus.edu/business/procurement-services/>
- Texas Parks and Wildlife Department - Business with TPWD  
<https://tpwd.texas.gov/business/>
- Texas State University System - Procurement and Strategic Sourcing  
<https://www.tsus.edu/business-affairs/procurement-services/>

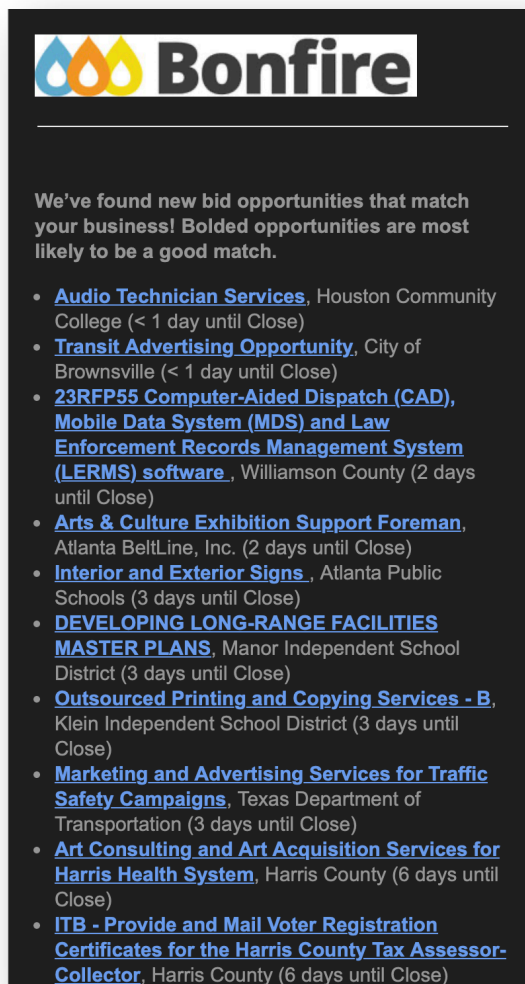


Here's a more extensive list of procurement websites and SLED Procurement Portals  
[List of Procurement Websites updated.pdf](#)  
[SLED Supplier and Procurement Portals](#)

## SETTING UP A BONFIRE ACCOUNT

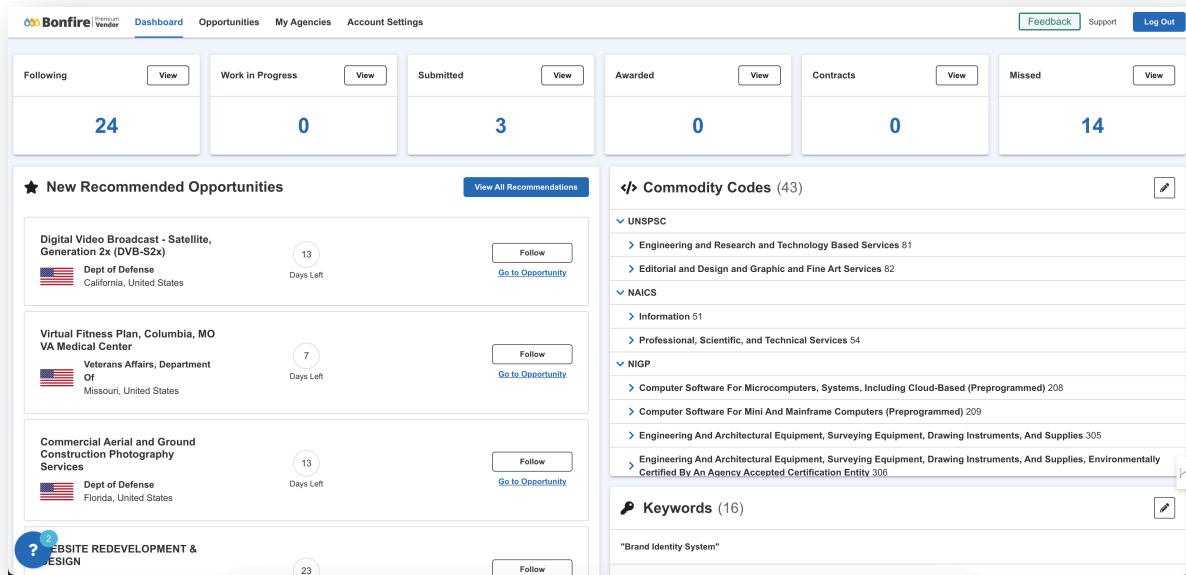
To sign up for a free Bonfire account, go to the Procurement Portal of the organization you'd like to register with, click on New Vendor Registration. You can find the procurement portal for most local government agencies by visiting their website and navigating to sections like "Procurement Services" or "bidding opportunities." You can also do a quick Google search for the name of the local agency and the words "procurement," "procurement services," or "bidding opportunities" to get a list of bid boards.

The free Bonfire account is great for exploring opportunities from specific organizations and submitting bids through their system. Bonfire will send you periodic emails like the example below with lists of opportunities that may be relevant to you based on other opportunities and agencies that you've reviewed in the past.





You may also sign up for a premium account with Bonfire for access to all opportunities from every agency (private or public across state, local, education and some federal) who utilizes Bonfire to post bid solicitations.

Bonfire places all opportunities into a singular feed where you can search for new opportunities, save filtered searches, and see all your relevant opportunities in a single dashboard. This saves time by eliminating the need to log into multiple systems, and it grants you access to more opportunities by having them all in one centralized place.



*Snapshot 3 BonfireHub Premium Account Dashboard*

At the time of this publication, an annual subscription of Bonfire premium costs \$499/year. However, Bonfire sends out special promotional offers of 10-50% off subscriptions like the one below throughout the year.



## Bidding in the public sector just got easier.

Upgrade to Bonfire Premium Vendor

For a limited time, you can save **50%** on your first year of [Bonfire Premium Vendor](#). You'll want to act fast, though - this offer **ends tomorrow at 1:00 pm ET**.

Get your discount by using the code **SAVEBIG** at checkout.\*

Need convincing? Here's two great reasons why you should upgrade to Premium Vendor:

- Easily discover over 200,000 public sector bid opportunities every year.
- View bid opportunities from all levels of government (local, state, and federal).

Signing up is quick and easy, but this deal won't last long, so upgrade today and take your bidding game to the next level.

Join now

Happy bidding,  
The Bonfire team

\*Discount expires Mar 6, 2024 at 1:00 pm ET. Regular price \$499 USD/year. For first-time customers only. Cannot be combined with any other offer.

*Snapshot 4 BonfireHub Premium Promotional Offer*

# GENERAL & CORPORATE CONTRACTING OPPORTUNITIES

Here are a few other general and corporate procurement portals:

PROCUREMENT PORTAL	URL
Housing Marketplace	<a href="https://www.housingagencymarketplace.com/">https://www.housingagencymarketplace.com/</a>
Govdirections	<a href="https://govdirections.com/">https://govdirections.com/</a>
Bidnet	<a href="https://www.bidnetdirect.com/">https://www.bidnetdirect.com/</a>
Sam.gov	<a href="https://sam.gov/search/">https://sam.gov/search/</a>
Bidspeed	<a href="https://fedbidspeed.com/">https://fedbidspeed.com/</a>
Fedconnect	<a href="https://www.fedconnect.net/">https://www.fedconnect.net/</a>
BidUSA	<a href="https://www.bidsusa.net/">https://www.bidsusa.net/</a>
Periscope S2G / BidSync	<a href="https://www.periscopeholdings.com/">https://www.periscopeholdings.com/</a>

## TYPES OF NOTICES

Government agencies issue several types of procurement notices to announce opportunities for contracts and to solicit bids or proposals from interested parties. The types and terminology can differ by jurisdiction and organization, but some of the most common types of procurement notices include:

- Pre-Solicitation Notices
- Solicitation Notices
- Sources Sought Notices
- Award Notices
- Justification and Approval Notices
- Cancellation Notices
- Amendment/Modification Notices
- Notices of Intent

We'll dive into the types of notices, what they are, why they are used, what to expect and how to address or respond to each of them in this section.

## PRE-SOLICITATION NOTICES

These are preliminary notices announcing that a particular contract opportunity will become available soon. The purpose is to alert potential suppliers or contractors to upcoming bids or proposals, allowing them to prepare.

## SOLICITATION NOTICES

Also known as Request for Proposals (RFP), Invitation for Bid (IFB), or Request for Quotation (RFQ), these are the primary types of notices that formally open the bidding or

proposal process for a contract. They contain all the information that interested parties need to submit a qualifying bid, such as the scope of work, deadlines, and submission guidelines.

## SOURCES SOUGHT NOTICES

These are early-stage notices to determine the availability of potential bidders or suppliers. It is a market research tool used to gauge the level of interest and capability among potential vendors for a future project. Think of Sources Sought Notices like solicitations of interest.

### WHAT TO EXPECT?

Within the Sources Sought Notice, the government agency will give instructions on the information that they require from responding contractors. In general, the contracting officer will request that you provide the following details about your business:

- References
- Capability Level
- Past Performance
- Rough Cost Estimate
- Rough Order of Magnitude

### HOW TO ADDRESS OR RESPOND?

When responding to a Sources Sought Solicitation, you might have questions. Here are a few thoughtful questions that you can ask when responding to an SSN to ensure clarity and alignment with the solicitation's objectives:

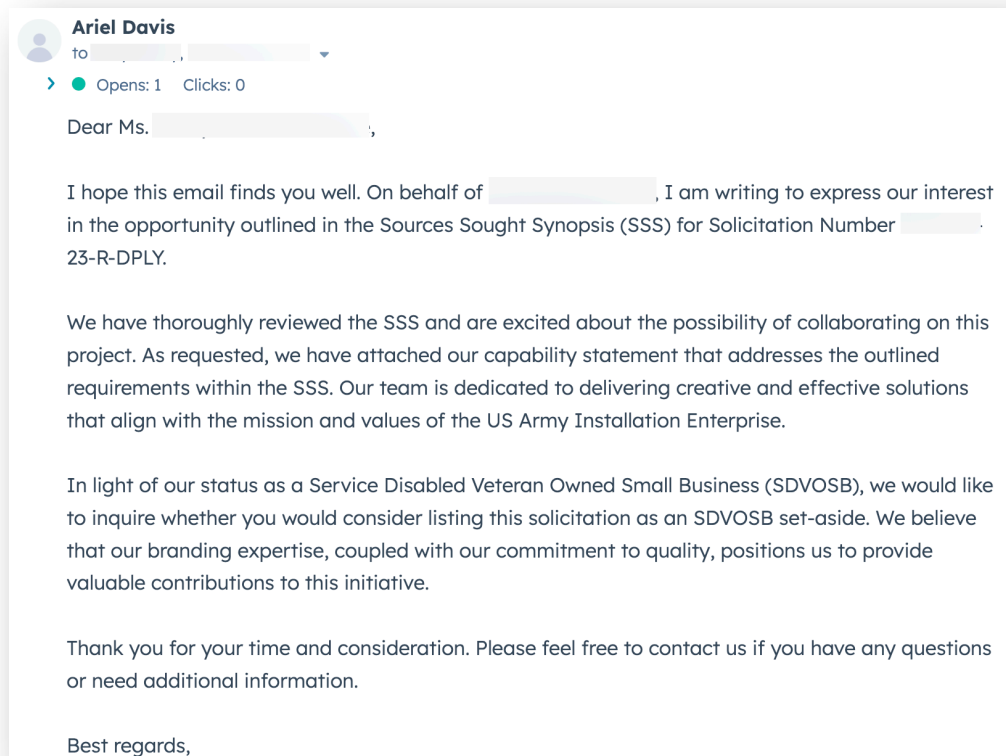
- **Clarification on Scope or Requirements:** Can you provide more details or clarify a specific aspect of the project scope or requirements mentioned in the solicitation?
- **Timeline Considerations:** What is the expected timeline for moving from the Sources Sought phase to the Request for Proposals (RFP)? When do you anticipate awarding the contract following the RFP?
- **Evaluation Criteria:** Can you share more details about the evaluation criteria for the proposals? What weightage or priority is given to specific criteria such as cost, technical capability, or past performance?
- **Set-Aside Considerations:** Are there plans to set this contract aside for specific business classifications, such as small businesses, women-owned businesses, or Service-Disabled Veteran-Owned Small Businesses (SDVOSB)?
- **Contract Type:** Do you anticipate this being a fixed-price, cost-reimbursement, time-and-materials, or another type of contract?

- **Potential Amendments:** Will there be a follow-up or amendments to the initial sources sought notice based on the feedback you receive?
- **Incumbents:** Is there an incumbent currently performing this work, and if so, will they be re-competing?
- **Team Arrangements:** Are there any specific guidelines or restrictions on teaming arrangements or subcontracting for this project?
- **Submission Details:** Did you receive our response and all the attachments without any issues? Is there a preferred format for any upcoming proposal submissions?
- **Feedback on Response:** Is it possible to get feedback on our response to the Sources Sought Solicitation to better prepare for a potential RFP?
- **Future Engagement:** Will there be an industry day or a pre-proposal conference where potential contractors can learn more and ask questions?
- **Contract Duration:** What is the anticipated duration of the contract, and are there options for renewal or extension?
- **Budget Constraints:** Can you provide any insights into the budgetary constraints or considerations for this contract?
- **Security and Access:** Are there specific security clearances required for personnel working on this project?
- **Past Performance:** How important is past performance with the agency versus general past performance in the industry when evaluating potential contractors?

Here is a link to a resource from NAVSEA that we found helpful regarding sources sought notices. It gives valuable strategies for responding to sources sought notices.  
[Strategies-for-Response-to-Sources-Sought-Notice.pdf](#)



## Example Response to Sources Sought Notice



## AWARD NOTICES

Once a contract has been awarded, a notice is often published to inform the public and involved parties about the winning bidder. This notice may contain details such as the contract value, duration, and a brief description of the procurement.

### FINDING SUB-CONTRACTING OPPORTUNITIES FROM AWARD NOTICES

Here are some email templates that we have used in the past for reaching out to awarded primes to solicit subcontracting opportunities.

Dear Mr. [REDACTED],

Congratulations on winning the [REDACTED] Scrim Design project with the National Park Service! My company, [REDACTED] LLC, specializes in graphic design, brand identity and web development. We understand this project is on a fast timeline, with design drafts due soon.

We are excited by the opportunity to partner with an interpretive design leader like [REDACTED]. Our team can quickly develop visually engaging graphics that bring historical events to life. We have experience designing for a range of brands in the private sector, and we are eager to grow our past performance.

Would you be open to discussing how we might support your team on this project? I've linked our capability statement detailing our qualifications below. We can turn around creative designs in days versus weeks. If there are any aspects of the scrim design that could be delegated to fast-working partners, we're ready to help.

[REDACTED], LLC - General Capability Statement 09.24.2023.pdf

Please let me know if you'd like to set up a call to explore partnering on this exciting project, or other upcoming projects. I'm confident we can deliver excellent work on the aggressive timeline. I look forward to hearing your thoughts.

Best regards,

## JUSTIFICATION AND APPROVAL NOTICES

These are special types of notices that provide public disclosure when a contract is awarded without full and open competition. For instance, if a sole-source contract is awarded, this notice will offer an explanation for why this route was taken.

## CANCELLATION NOTICES

If an RFP, IFB, or RFQ is canceled for any reason, a cancellation notice is published to inform all interested parties that the solicitation has been nullified, often with a reason for the cancellation.

## AMENDMENT OR MODIFICATION NOTICES

During a solicitation, changes may be necessary due to errors found in the initial document, changes in project scope, or extensions in deadlines. Amendment or modification notices provide updated information to all interested parties.

## NOTICES OF INTENT

These are notices given when an agency intends to negotiate and award a contract to a specific company, typically without competition. This is common for contracts that require highly specialized skills or resources that only one or a very few suppliers can provide.

## GOVERNMENT CONTRACTING POINTERS

### GOVCON TOOLS & RESOURCES

- Beta.Sam.gov (free): Daily usage, specifically for the daily email alerts for released RFIs, RFPs as well as contract awards
- USASpending (free): Weekly usage, specifically for pipeline development
- Acquisition.gov - provides procurement forecasts and access to the FAR. <https://www.acquisition.gov/>
- Federal Procurement Data System (FPDS) (free): As-needed basis, specifically to confirm information from the other tools
- GSA ELibrary (free:) As-needed basis, specifically for competitive research
- GovTribe (paid): Daily usage, specifically for contract and competitive research
- Govwin (paid): Weekly basis, specifically for contract and competitive research and pipeline development.
- <https://www.sba.gov/federal-contracting/contracting-guide>
- AcqNotes (fee): AcqNotes is a website that complements the traditional DoD acquisition resources by providing a place where people can learn basic concepts of an acquisition-related topic (Notes) before exploring these traditional resources for more detailed information. These traditional resources can be difficult to find and understand due to the large amount of information they provide and the wide variety of resources available. AcqNotes simplifies this information into easily understandable topics so its users can gain a better understanding of the topics they desire and the resources available to them. <https://acqnotes.com/>

### SOURCING RESOURCES

Not sure where to source materials for your business or contract fulfillment? Start here.

- <https://business.thomasnet.com/industrial-buying-engine-for-suppliers>
- <https://materialconnexion.com/>

### BID PRICING

#### EFFECTIVELY PRICING YOUR CONTRACTS

Many individuals encounter challenges when it comes to pricing their contracts, often due to a lack of thorough pricing research.

To assist you in obtaining accurate pricing information or at least a rough estimate, here are some valuable resources:

- **GSA eLibrary:** The General Services Administration (GSA) offers GSA schedules that publicly disclose the rates they employ for labor hours in professional services.
  - You can access this information at the following link:  
<https://www.gsaelibrary.gsa.gov/ElibMain/home.do>
  - You can also access The Contract-Awarded Labor Category (CALC) tool which allows you to check your competitors' pricing:  
<https://buy.gsa.gov/pricing/>
- **USA Spending:** Another useful resource is the USA Spending platform, which can provide insights into government spending. <https://www.usaspending.gov/>
- **Contact Contracting Officials:** Reach out to contracting professionals and inquire about their insights.

#### GOVCON PRICING TERMS

- **Rough Order of Magnitude (ROM)** - A broad estimate that provides a rough idea of the expected cost without precise details.
- **Dollar Range** - A specified range of potential costs within which a contract's price may fall, offering flexibility and guidance in pricing negotiations.
- **Not-To-Exceed (NTE) Figure** - A maximum limit or cap on the contract price that should not be exceeded during the contract's execution.
- **Previous Award** - Additionally, you can inquire whether a similar contract has been previously awarded and request information regarding the value of that previous award. This insight can help you gauge pricing expectations and competitive benchmarks for your own contract proposals.

Remember that pricing for government contracting is just plain old business pricing. The government is a client just like any other; they just have special rules, regulations, and processes that they must follow.

## DECODING FEDERAL GOVERNMENT CONTRACT NUMBERS

In this section, we will delve into the intricacies of deciphering federal government contract numbers, shedding light on the hidden code that governs opportunity identification and contract numbering within the realm of government contracting.

Have you ever wondered about the enigmatic federal GovCon "codes"?

We're not just talking about the North American Industry Classification Systems (#NAICS) and Product and Service Code (PSC) – there's a deeper layer to this system.

The federal government uses a consistent numbering scheme in nearly all federal solicitations, from Requests for Proposals (RFPs) to Requests for Quotations (RFQs), as well as contract award numbers.



This system is officially documented in the Federal Acquisition Regulation (FAR), found here: <https://www.acquisition.gov/node/28999/printable/print>

### Let's break down this code for interpretation:

Example: OFFICE-YR-X-1234

- The first six digits correspond to the contracting office responsible for issuing the notice on SAM.gov, providing crucial insights into the source of the opportunity.
- The subsequent two digits hold the fiscal year within which the notice was generated, spanning from October 1st to September 30th. This seemingly minor detail offers a temporal context to the opportunity.
- The following digit is indicative of the notice type. For example, the ones on the pre-award side include "R" for RFP and "Q" for RFQ. On the post-award side, "D" signifies an Indefinite Delivery/Indefinite Quantity (IDIQ) contract, while "C" denotes a standalone award.
- The last four digits follow a sequential pattern that resets with each fiscal year. Consequently, opportunities released, and contracts awarded in October will have low-digit suffixes, while those originating in September may carry numbers in the hundreds, contingent upon the volume of work within the contracting office.

As the saying goes, knowledge is power. Understanding these intricacies can empower you in navigating the complex landscape of government contracting.

## COMMON PROBLEMS & TROUBLESHOOTING

### ENTITY ADMINISTRATOR APPOINTMENT LETTERS

Here is an updated notarized letter Template for you to use. If SAM asks you to submit an Entity Administrator Appointment Letter, this is what they mean. You submit it at FSD.gov (not SAM.gov).

[SAM\\_Notarized\\_Letter\\_Template.docx](#)



Note: Find more information about how to become the new administrator for your entity within SAM.gov at [https://www.fsd.gov/gsafsd\\_sp?id=gsafsd\\_kb\\_articles&sys\\_id=8d846467db59299094439f95f39619e9](https://www.fsd.gov/gsafsd_sp?id=gsafsd_kb_articles&sys_id=8d846467db59299094439f95f39619e9)

## SUBCONTRACTING & TEAMING

When one company, usually a big one that has a government contract, needs some extra help to complete the work. Instead of doing everything themselves, they want to hire smaller businesses to do certain parts of the job. These smaller businesses are called subcontractors.

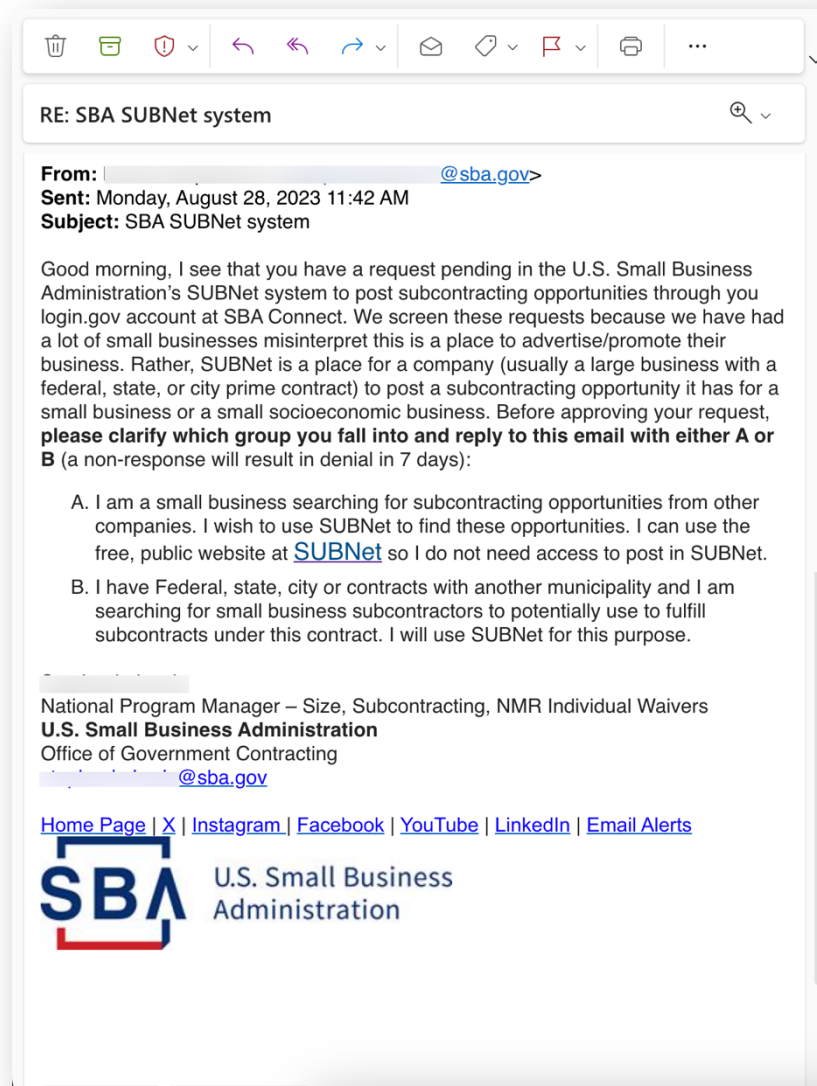
If you are just starting out, experts recommend starting out with subcontracting. The government requires that large businesses subcontract part of their work to small businesses.

## **FINDING SUBCONTRACTING AND TEAMING OPPORTUNITIES**

Here are some ways you can find large companies to subcontract with.

### **WEBSITES AND DATABASES**

- **USA Spending** – Use this tool to find prime contractors in your local area.  
<https://www.usaspending.gov/>
- **SBA Directory of Federal Government Prime Contractors w/Subcontracting Plans**  
Use this directory <https://www.sba.gov/document/support-directory-federal-government-prime-contractors-subcontracting-plans>
- **SUBNet** is a system that helps businesses find subcontracting opportunities. Some small businesses have misunderstood SUBNet and thought it's a place to advertise their own business. But that's not what it's meant for. SUBNet is a place where big companies with government contracts find smaller businesses to help them with specific parts of their project.



Note: If you are a small business that wants to find opportunities to work with other companies as a subcontractor, you're just looking for jobs, and you don't need to post anything on SUBNet, you can use the free SUBNet website to search for these chances.

## EVENTS

- Small Business Outreach Events
- Meet the Buyer Events
- Small Business Events
- Vendor Outreach
- Open House

## COMMUNICATION WITH PRIME CONTRACTORS

When reaching out to prime contractors to partner or team with as a subcontractor, you'll want to reach out to either the Small Business Program manager, the Small Business Advocacy Office, or the Small Business Liaison Office. Your goal is to create a long-term business relationship with the contractor, not a short-term or instant subcontract.

### **Things to communicate to the Prime Contractor**

- Let them know you want to network and build a long-term relationship.
- Explain what you do
- Describe your product and/or service
- What sets you apart and makes you special?



# FOSTERING RELATIONSHIPS

In government contracting, networking and fostering relationships is key. Here are some thought starters for how you can begin to foster relationships that help you secure contracts.

## MEETING WITH COUNTY BOARD OF COMMISSIONERS

A meeting with the County Board of Commissioners is a significant event where county officials gather to discuss and make decisions on various matters that affect the local community. The County Board of Commissioners is responsible for governing and overseeing the affairs of the county.

### Here are some key points related to such meetings:

- **Purpose:** County Board of Commissioners meetings serve several purposes, including approving budgets, enacting ordinances, making policy decisions, and addressing issues raised by the public.
- **Responsibilities:** County Commissioners have specific duties, which may include managing county finances, infrastructure, public safety, and more, depending on the county's structure and needs.
- **Agendas and Minutes:** Agendas for these meetings are typically made available to the public in advance, and minutes are recorded to document decisions and discussions. These can often be accessed on the county's official website.
- **Meeting Locations:** Meetings are usually held in a designated public place, such as a county courthouse or government building. The specific location can vary by county.
- **Rules of Procedure:** Meetings follow established rules of procedure and decorum to ensure orderly and fair discussions. Sample rules can often be found on the county's website.
- **Accessibility:** Some County Board of Commissioners meetings are recorded and made available online, allowing residents to watch proceedings remotely.



In Texas, the Tarrant County Commissioners Court holds monthly meetings. They are recorded and shared on their YouTube Channel linked below.

<https://www.youtube.com/@TarrantCountyTX>

## COUNTY COMMISSIONERS IN TEXAS

Here is a list of other County Commissioners in Texas

COUNTY	URL
Harris County	<a href="https://agenda.harriscountytexas.gov/">https://agenda.harriscountytexas.gov/</a>
Bexar County	<a href="https://www.bexar.org/146/Commissioners-Court">https://www.bexar.org/146/Commissioners-Court</a>
Travis County	<a href="https://www.traviscountytexas.gov/commissioners-court">https://www.traviscountytexas.gov/commissioners-court</a>
Dallas County	<a href="https://www.dallascounty.org/government/comcrt/meeting-schedule.php">https://www.dallascounty.org/government/comcrt/meeting-schedule.php</a>
Tarrant County	<a href="https://www.tarrantcountytexas.gov/en/commissioners-court/">https://www.tarrantcountytexas.gov/en/commissioners-court/</a>
Val Verde County	<a href="https://valverdecountry.texas.gov/296/Commissioners-Court-Meetings">https://valverdecountry.texas.gov/296/Commissioners-Court-Meetings</a>
Hidalgo County	<a href="https://www.hidalgocounty.us/79/Commissioners-Court">https://www.hidalgocounty.us/79/Commissioners-Court</a>
Nueces County	<a href="https://www.nuecesco.com/commissioners-court/">https://www.nuecesco.com/commissioners-court/</a>
Collin County	<a href="https://www.collincountytexas.gov/Government/Commissioners-Court">https://www.collincountytexas.gov/Government/Commissioners-Court</a>

## FORTUNE IN THE FOLLOW-UP

Following up with a government agency after submitting a proposal or capability statement is a critical part of the procurement process. It ensures that your business stays top-of-mind and could lead to future opportunities.

Here are some best practices for effective follow-up:

### TIMING

1. **Immediate Follow-Up:** Send a thank-you email within 24-48 hours after submitting your capability statement, confirming its receipt, and asking for an estimated timeline for review or next steps.
2. **Scheduled Follow-Ups:** If you don't hear back within the given timeline, it's acceptable to follow up every two weeks to a month depending on the nature of the project or procurement cycle.

### After Submission Follow-Up Cadence

RESPONSE TO	WHEN TO FOLLOW UP
<b>Request for Proposal (RFP)</b> <b>Request for Quote (RFQ)</b>	Follow up with an email within 3-4 weeks of your proposal submission
<b>Sources Sought Solicitation (SSS)</b>	Follow up with an email within 1 week to learn their acquisition decision

## FOLLOW-UP ETIQUETTE

Be mindful of the way that you communicate. Ensure that you have read the RFP, addendums, and attachments, especially if Q&A has already been answered, before reaching out to the contracting officer. This will ensure that you are asking thoughtful questions, demonstrating that you are well informed by the RFP, but are merely seeking clarification to best serve the project.

Be mindful that contracting officers move around between agencies and talk to one another. Be mindful that having an unfavorable exchange with one contracting officer can have potentially negative effects on your reputation among contracting officers, an agency, or multiple agencies.

## QUESTIONS TO ASK

**Is there an incumbent currently holding this contract? If so, could you please provide the contract number and the contract value for reference?**

While I understand that it may not be possible to disclose the Internal Government Estimate or Internal Gov Cost Estimate for this contract, would you be able to provide either a Rough Order of Magnitude (ROM), a Dollar Range, or a Not-To-Exceed (NTE) Figure? Any of these would be highly beneficial for us in formulating our proposal.

**Can you make this an SDVOSB / 8a / WOSB set-aside?**

Note: Both SBA's regulations and the Federal Acquisition Regulation require agencies to consider SBA socio-economic programs (SDVOSB / WOSB / 8a) first for set-aside and sole-source contracts above \$250,000. There is no order of preference among the programs.

If the contract value is between \$10,000 and \$250,000, then agencies must automatically and exclusively set aside for small businesses.

In general, if there are at least two small businesses that could do the work for a fair price, the contract should be set aside exclusively for small businesses to compete. If there are fewer than two, a sole-source contract, or full and open competition may be issued.

## COMMUNICATION METHODS

- Email: Start with a polite email as your first follow-up. It's less intrusive and gives the recipient time to respond.
- Phone Calls: If emails go unanswered, a phone call might be necessary. Ensure you're calling at a convenient time and are prepared to discuss your capability statement in detail.

## CONTENT

- Be Specific: Reference any meetings, conversations, or correspondence that led to your submission. The more specific you are, the easier it will be for the agency to remember you.

- **Reiterate Value:** Briefly summarize how your product or service can solve the agency's needs, reinforcing the core points of your capability statement.
- **Ask for Feedback:** If an adequate amount of time has passed without a response, politely ask for feedback on your submission. This not only shows that you're proactive, but also gives you valuable insights for future submissions.

## TONE & PROFESSIONALISM

- **Be Polite and Professional:** Always be courteous and professional in your communications. Use formal titles and last names unless told otherwise.
- **Be Concise:** Government officials are typically busy. Keep your follow-up communications short and to the point.
- **Proofread:** Spelling and grammar errors can make a bad impression. Double-check your emails or any other correspondence.

## NETWORKING

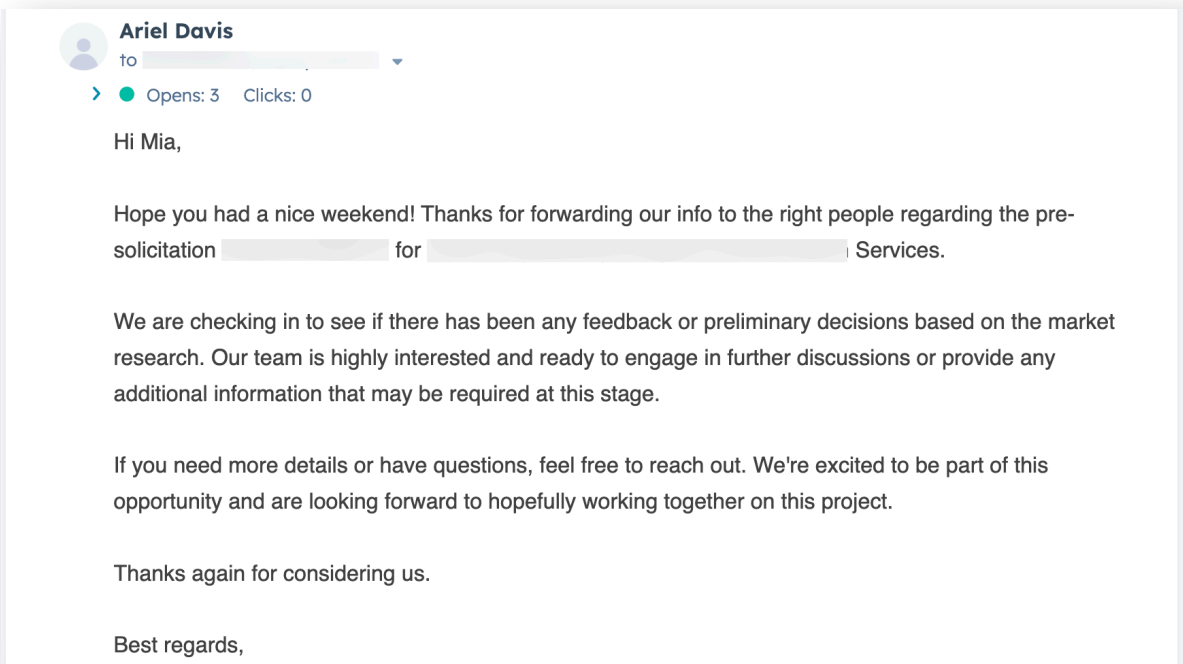
- **Leverage Existing Contacts:** If you have contacts within the agency, you can ask them to check on the status of your submission.
- **Connect on LinkedIn:** Consider connecting with relevant agency personnel on professional networks like LinkedIn, but make sure your approach is appropriate and respectful.

## DOCUMENTATION

- **Keep Records:** Maintain a log of all your communications for future reference.
- **Set Reminders:** Use digital tools to set reminders for follow-up, so you don't miss out on any opportunity.

## FOLLOW-UP TEMPLATES

Following up after responding to a sources sought notice



# BID FACTORING

In the context of government contracting, "factoring" refers to a financial arrangement where a government contractor sells its accounts receivable (unpaid invoices) to a third-party financial institution, known as a "factor." The factor then provides the contractor with immediate cash, usually a percentage (typically around 80-90%) of the invoice's face value, while assuming responsibility for collecting payment from the government agency or entity that owes the money.

## HOW BID FACTORING WORKS

Here's how factoring works in government contracting:

- **Contract Execution:** A government contractor secures a contract with a government agency to provide goods or services. The contract includes payment terms, often specifying when and how the government will pay the contractor.
- **Invoice Generation:** After fulfilling the terms of the contract, the contractor submits an invoice to the government agency for the agreed-upon amount.
- **Factoring Agreement:** The contractor enters into a factoring agreement with a third-party factor, such as a financial institution or factoring company. This agreement outlines the terms and fees associated with the factoring arrangement.
- **Invoice Submission to Factor:** The contractor submits the invoice to the factor, which then evaluates the invoice for creditworthiness and the likelihood of payment by the government agency.
- **Advance Payment:** Upon approval, the factor provides the contractor with an immediate advance payment, typically a significant portion of the invoice's total value.
- **Collection and Payment:** The factor takes over the responsibility of collecting payment from the government agency. When the government agency pays the invoice, the factor deducts its fees and interest (if applicable) and remits the remaining amount to the contractor.
- **Ongoing Factoring:** Government contractors may choose to factor multiple invoices or continue factoring as needed to maintain a steady cash flow, especially if they have a large number of outstanding invoices.

## BENEFITS OF FACTORING

Factoring can be beneficial for government contractors for several reasons:

- **Improved Cash Flow:** Factoring provides immediate access to cash, helping contractors cover operating expenses, fulfill new contracts, or invest in business growth.
- **Reduced Risk:** Factoring companies assess the creditworthiness of government agencies, reducing the risk of non-payment.
- **Streamlined Operations:** Contractors can focus on their core business operations while the factor handles invoicing and collections.

It's essential to consider the costs associated with factoring, including fees and interest rates, which can vary depending on the financial institution and the specific terms of the agreement. Contractors should carefully evaluate the financial implications and decide whether factoring is the right solution for their government contracting needs.



To help you get started, try using our bid factoring calculator here:  
<https://hi.switchy.io/l2Xt>

In the complex world of government contracting, securing the necessary funding to drive projects forward can often be a daunting challenge. This section explores a variety of bid factoring companies and factor alternatives that offer tailored solutions for government contractors, businesses and gig workers seeking financial support. Some organizations understand the intricacies of federal procurement processes, regulations, and the unique needs of contractors, providing a lifeline of financial support. Others offer flexible financing terms but do not specifically work with government contractors.

Whether you're a startup navigating your first government contract or a seasoned contractor looking to optimize cash flow, these financial partners offer a range of services designed to help you thrive in the competitive world of government contracting. Explore the options ahead to discover how these financial allies can empower your business and projects.

## BID FACTORING COMPANIES

### **Republic Capital Access (RCA)**

Republic Capital Access is a specialized commercial finance company that exclusively serves government contractors, offering tailored financial solutions based on their deep understanding of the federal procurement process and regulations. They prioritize building long-term relationships with their clients and work with a wide range of companies, including startups, those in growth stages, and those facing financial challenges. Established in 2009, RCA is now the largest and fastest-growing company of its kind, operating as a subsidiary of Stephens Investment Holdings, LLC, with a dedicated team of professionals committed to providing expert financial advice and services from their Herndon, VA location.

<https://republiccapitalaccess.com/>

### **Action Capital Corporation**

Action Capital Corporation has been a trusted provider of commercial finance solutions since 1959, originally serving government contractors but now offering flexible working capital financing to a wide range of small and medium-sized businesses across various industries in the United States. Their credit products include commercial financing, factoring, asset-based lending, and government contractor financing, with options ranging from monitored A/R facilities starting at \$50,000 to ledgered lines of credit up to \$7 million. With a streamlined application process and quick turnaround times, Action Capital Corporation is dedicated to helping entrepreneurs access the capital they need to start, grow, sustain, or turnaround their businesses.

<https://www.actioncapital.com/>

### **Now Corp**

Now Corp is a financial services company that offers a user-friendly platform for businesses to quickly convert their receivables into cash. They provide a straightforward three-step process for getting paid faster, with features like customer approval, invoice uploading, and ACH payments. Now Corp aims to help businesses grow by accelerating invoice payments and offers testimonials from satisfied clients who have experienced significant revenue growth with their services.

<https://nowcorp.com/>

### **Resolve**

Resolve is a B2B payments and credit management platform that helps businesses get paid on their terms. With features like online payment portals, automated payment processing, credit checks, and invoice financing, Resolve empowers businesses to streamline their accounts receivable processes and improve cash flow. Trusted by over 12,000 businesses, Resolve offers integrated solutions that remove the uncertainty from credit decisions and accelerate payment cycles.



<https://resolvepay.com/>

## Dallas Factors & Finance

Dallas Factors & Finance is a well-established commercial financing solutions provider, serving small and medium-sized businesses since 1999. They offer immediate working capital through invoice factoring, allowing businesses to receive up to 96% of the invoice value within 24-48 hours. With a strong reputation for customer service and a specialization in challenging credit cases, Dallas Factors & Finance is a trusted partner for businesses looking to improve their cash flow.

<https://getstarted.dallasfactors.com/>

## FACTOR ALTERNATIVES

Alternative lending fills the gap between what your bank can do and the funding you need.

## Parabilis

Parabilis is a financial company with a seasoned management team boasting over 100 years of government contracting executive experience. They offer flexible and affordable lines of credit to support the growth of small and medium-sized government contractors.

Parabilis distinguishes itself from predatory loans and invoice factoring by providing fast and transparent lending solutions, empowering contractors to bid with confidence, fund rapid growth, and protect their profits.

They don't do invoice factoring. Instead, they provide payroll, operating expenses, and other things to get you going when you don't have an invoice in-hand. In the event of CR or government shutdown, contractors continue to work even though the payments have stopped. However, Parabilis is an alternative lender that backs the contractor as a "silent partner." They do not engage with or interact with the contracting officer.

**Who they work with:** Service providers and government resellers.

How long, what do you need to see (financial reporting and sustainable growth, dollar amount), what alternative lenders do you work with

<https://parabilis.com/>

## Giggle Finance

Giggle Finance is a financial services company dedicated to empowering the Gig Economy workforce. They offer instant funding of up to \$5,000 for freelancers, including 1099 workers, independent contractors, consultants, and app-based freelancers. With a commitment to providing financial peace of mind, Giggle Finance's automated platform ensures 24/7/365 access to cash, supporting entrepreneurs in managing unexpected expenses and seizing business opportunities.

<https://gigglefinance.com/>

## 7A Funding

7A Funding is a leading provider of SBA (Small Business Administration) loans, offering quick and affordable financing solutions for businesses across the United States. With a strong focus on facilitating financial success, 7A Funding specializes in securing funds rapidly and at the best possible rates. They work closely with various clients, including banks, brokers, borrowers, and insurance agents, to source and fund SBA loans. Notably, 7A Funding is a major player in the SBA industry, consistently closing approximately \$75 million in SBA loans each year. Their services cater to a diverse range of needs, from business acquisitions and expansions to partner buy-ins and buyouts, and working capital requirements. They have a strong track record of supporting franchisors and financial institutions, crafting tailored loan structures to ensure the success of potential franchisees. With their extensive network and expertise, 7A Funding is a go-to source for businesses seeking efficient and effective SBA loan solutions.

<https://www.7afunding.com/>

## Fundo

Fundo is a financial service company based in North Miami Beach, FL, specializing in Merchant Cash Advances tailored to meet the needs of gig workers and small businesses. They offer quick and transparent funding solutions of up to \$10,000, with a simple application process that doesn't impact your credit score. Fundo aims to bridge the financing gap for gig workers and self-employed individuals, providing them with an alternative to traditional loans and personal guarantees, with minimum eligibility requirements, making it accessible to a wide range of freelancers, small business owners, contractors, and sellers.

<https://www.fundo.com/>

## Global Trading Partners

Global Trading Partners is a financial company that specializes in providing Purchase Order (PO) finance solutions to a wide range of clients, including importers, exporters, domestic manufacturers, government contractors, brokers, and more. They offer easy application processes with no minimum term or transaction volume requirements, making it accessible for businesses of all sizes. Located in Solana Beach, CA, they are committed to fueling growth by supplying the necessary working capital to help businesses deliver on their promises and expand into new markets.

<https://globaltradingpartners.com/>

# PROPOSAL WRITING TIPS

When writing a proposal, you must read the RFP/RFQ and all attachments thoroughly. Make sure you sign all necessary forms and acknowledgements and attach required documents requested within the solicitation. In GovCon, you will lose more bids than you win, and that's okay. GovCon is a marathon, not a sprint. Be thorough, patient, and optimistic while taking each step as a learning experience to improve upon your processes within the government contracting space. Here are some tips that will help you be successful when it comes to writing proposals.

Every response varies. Proposals don't win the work. Instead, you must create relationships, ask the right questions, and understand what it takes to win. If you don't win, you get a debrief. A debrief gives you feedback about why the bid was not awarded.

## PROPOSAL WRITING RECIPE FOR SUCCESS

1. **Check the Rules:** First, make sure you understand what the contracting officers (the people awarding the contract) are looking for. Look at their criteria and make sure that your proposal matches those criteria. It's like making sure you have the right ingredients for a recipe.
2. **Follow the Instructions:** When you write your proposal, stick to the rules they've given you in the bid document. The agency may have a specific page limit, file format, font size or other guideline that they would like all respondents to follow. Imagine it's like following a recipe step by step - don't skip any steps.
3. **Introduce Yourself:** Get in touch with the person in charge (the Point of Contact or POC). Reach out by both calling and emailing to say hello. This is like saying "Hi" to the judge before a competition; it can help make a good impression.

## WHAT YOU'LL NEED TO WRITE A PROPOSAL

To write a government contracting proposal, you'll need the following tools and resources:

1. **Computer:** A computer is the fundamental tool for creating and formatting your proposal. It provides the platform for drafting, editing, and organizing your content.
2. **Microsoft Office:** Microsoft Office software, including Word, Excel, and PowerPoint, can be invaluable for creating a professional proposal. Word is especially useful for writing the proposal, while Excel can be handy for financial projections and data analysis. PowerPoint or Keynote may be needed for presentations in some cases.
3. **Adobe:** Adobe software, such as Adobe Acrobat, is important for creating and editing PDF files, which are often the required format for government contract proposals. PDFs ensure that your document's formatting remains consistent across different devices and platforms.
4. **AI Tools:** Enlist the help of AI tools such as ChatGPT, Claude, or Google Bard can assist with generating, reviewing, and improving your proposal content. It can help you brainstorm ideas, proofread your text, and refine your writing, making your proposal more persuasive and professional.

LOOK OUT FOR IMPORTANT INFORMATION

When reviewing the RFP, highlight the important parts such as important dates, evaluation criteria, submission criteria, special meetings such as pre-bid or on-site meetings, special documents or notarized documents, insurance requirements, bid bonds, or other special circumstances and requirements.

DATES/MILESTONES

what are the dates of note within the RFP? What is the “period of performance,” the start and end dates of the contract period? When are responses due? Is there a period of performance along with an option period to continue working with the government on the project after the initial project end date? Does the government have a timeline planned for accepting and reviewing offers, awarding the contract and milestones throughout the contract?

EVALUATION CRITERIA

what is the government agency looking for to evaluate each candidate? Often, this is a combination of price, technical capacity, and past performance. The evaluation criteria can vary depending on the agency and the opportunity. The way that the evaluation criteria is displayed within the RFP/RFQ may also vary depending on the opportunity.

Here are some examples of what to look for within the solicitation:

**EVALUATION FACTORS:** Factors such as [proponents](#) overall capability, specialized experience, reputation, past performance on similar projects, technical competence, financial stability, ability to meet program goals, delivery under the contract terms, and fee schedule will be considered in the award recommendation. Commitment in the level of MBE/WBE firms, consultants and employees will also be considered in the evaluation of proposals.

Areas of Consideration
A. Offeror Past Performance
B. Design Team & General Contractor Qualifications
C. Financial Resources
D. Project Management Plan

SUBMISSION CRITERIA

does the government agency want proposals in a specific format or file type?

## PRE-BID MEETING

will the government hold a “pre-bid” meeting or on-site meeting? A pre-bid meeting is a virtual or in person meeting wherein the offering agency talks about the RFP and its requirements. Is the pre-bid or on-site meeting required or optional? Although every opportunity is unique, most pre-bid meetings are optional, but attendance is strongly recommended so that you can ask questions and get clarifying information that you may need to appeal to within your proposal. On-site meetings are often mandatory, and they are great opportunities to understand the project while you establish rapport with the contracting officer.

## NOTARIZED DOCUMENTS REQUIREMENTS

does the RFP require special forms or documents that need to be notarized? Don't get caught last second needing a special document to be produced or notarized before your submission. Check your document for the need for notarized documents, or documents that are not otherwise easy to come by.

## INSURANCE REQUIREMENTS

some agencies or contracts require candidates to obtain specific insurance coverages. Make sure you understand what those requirements are and obtain any documentation aligned to demonstrate that you either have or can quickly obtain the coverage you need should you be awarded the contract.

## BID BONDS

A bid bond is a type of surety bond required when bidding on many government projects. It serves as a guarantee that as the bidding contractor, you have the financial means to take on the job. It also assures the government agency that you will enter into the contract by providing the necessary performance and payment bonds if awarded the project. Bid bonds are typically around 5-10% of the total bid amount. The bid bond protects the government by allowing them to claim costs against it if the winning contractor fails to execute the contract as promised. The bond demonstrates the contractor's credibility and commitment to the bid, while also deterring unqualified bidders from the process.

When in doubt, do a quick search within the document (press CTRL + F on a PC, pr Command + F on a MAC) to identify any portion of the RFP that mentions any of the above-mentioned bullets or phrases like “mandatory, non-responsive” or “required.”

# POST AWARD DEBRIEFING OF OFFERORS

While it is understandable that not all proposals will be selected for a government contract, should your submission not be chosen, you have the option to request a post-award debriefing with the contracting officer. A debriefing is a structured review that offers insights into how your proposal was assessed following the decision on the contract award.

This session will shed light on the evaluation of your proposal and the rationale behind the selection decision, ensuring no sensitive or confidential details are divulged. The goal is to enhance transparency in the decision-making process, empowering you with clarity about the strengths and areas for improvement in your submission.

## WHAT DOES THE FAR SAY ABOUT DEBRIEFING?

Debriefings are mentioned within the FAR in section 15.506 Post award Debriefing of Offerors. Here is a summary of what it says.

### REQUEST & TIMING

Offerors can request a debriefing within 3 days after being notified of a contract award. Ideally, this debriefing should take place within 5 days of the request. However, those who opt for a post award debriefing over a pre-award one or get delayed due to genuine reasons should also be debriefed within this time.

### EXCLUSIONS & DELAYS

Offerors excluded from competition without a timely request are not entitled to a debriefing. While late debriefing requests might be entertained, this does not necessarily prolong the deadline for filing protests. Any debriefing delays can impact the timeliness of subsequent protests.

### METHOD & PARTICIPANTS

Debriefings can be conducted orally, in writing, or by any method deemed appropriate by the contracting officer, who typically chairs the session. Those who evaluated the proposals should support the debriefing.



Note: Here is a link to the section of the FAR that talks about debriefing:  
<https://www.acquisition.gov/far/15.506>

## DEBRIEFING INFORMATION

The information provided should cover:

- Evaluation of any significant weaknesses in the offeror's proposal.
- Evaluated cost/price and technical rating of the successful and debriefed offeror, along with past performance data of the latter.
- Overall ranking of all offerors if a ranking was made.
- Summary explaining the reason for award.
- Details of the product from the successful offeror for commercial product acquisitions.
- Answers to questions regarding adherence to source selection procedures.

## LIMITS ON INFORMATION

Debriefing won't involve direct comparisons of proposals or disclose information that is considered trade secrets, confidential manufacturing processes, privileged commercial/financial data, or names of those providing past performance references.

## DOCUMENTATION

An official summary of the debriefing should be documented in the contract file.

## REQUESTING A DEBRIEFING

Requesting a debriefing typically involves following a series of steps, which are standard across most agencies but can vary depending on specific agency protocols.

Here is a general guide to help you request a debriefing:

### KNOW YOUR RIGHTS & TIMELINES

Familiarize yourself with the specific solicitation or agency's guidelines. Often, you will have a specific time frame within which you can request a debriefing after being notified of a contract award decision.

### PREPARE A FORMAL REQUEST

Draft a letter or email formally requesting the debriefing. Address it to the contracting officer or appropriate authority responsible for the solicitation.

- Begin with an acknowledgment of the notification of the contract award.
- Clearly state that you are seeking a post-award debriefing.
- Mention the specific solicitation number and title for clarity.

### BE SPECIFIC

If there are areas or aspects of your proposal about which you would like detailed feedback, mention them in your request. However, keep the tone professional and avoid sounding confrontational.



#### REQUEST PROMPT SCHEDULING

While understanding that securing a timeslot for a debriefing might require some time, it's okay to express your preference for a prompt scheduling, if possible.

#### FOLLOW PROTOCOL

If there is a specific method or format the agency prefers for debriefing requests, make sure to follow that. This could be outlined in the original solicitation document or on the agency's website.

#### SEND & CONFIRM RECEIPT

After sending your request, ensure it was received. If sent via email, you might receive an automatic acknowledgment. If sent by mail, consider using certified mail or another method that provides delivery confirmation.

#### STAY PROFESSIONAL

Once your request is accepted and the debriefing is scheduled, approach the session with an open mind. Remember, the goal is to gain insights for improvement, not to challenge the decision.

## Debriefing Follow Up

If you don't receive a response within a reasonable period, consider sending a polite follow-up to reiterate your interest in the debriefing and to confirm that your initial request was received.

Lastly, always consult the specific solicitation, contract, or agency guidelines. They may have steps or requirements unique to that agency or contract.

Here is an example of an email that we sent to a government agency requesting a debriefing.

▼ Email - Request for Debriefing | Contract Award Number: [REDACTED]



Ariel Davis

to [REDACTED]

● Sent

Dear Ms. [REDACTED],

I hope this finds you well. On behalf of [REDACTED] LLC, I'd like to request a post-award debriefing for Contract Award Number: [REDACTED], Notice ID: [REDACTED].

We noticed the award to [REDACTED] on Sep 21, and would love some feedback on our proposal. Specifically:

- Key areas influencing the award decision
- Strengths or weaknesses highlighted during evaluation
- Insights into the overall ranking, if available

Could we possibly schedule a debriefing soon? We're flexible with the format, be it over the phone or virtually.

We truly value the transparency of the Department of Veterans Affairs and are eager to learn from this experience.

Thanks for considering our request.

Warm regards,

## CLOSING THOUGHTS ABOUT POST AWARD DEBRIEFING OF OFFERORS

Please note that securing a timeslot for the debriefing may require some time. During the debriefing, it would be beneficial to inquire about specific areas of enhancement in your proposal and to understand your standing relative to other contenders.

Additionally, this interaction can serve as a platform to establish and nurture a positive relationship with the agency.

Good Afternoon Ariel,

Thank you for your email. I have asked the facility POC to provide more specific information regarding your proposal, per your questions below. As soon as I receive it from him, I will send over. I can tell you that overall your proposal was considered technically acceptable, and was the 2<sup>nd</sup> choice following [REDACTED]. The final determining factor came down to overall cost of the proposal. I'll forward the additional information once I receive it. Have a wonderful day.

# CORRESPONDENCE TEMPLATES

## RESPONSE TO PRE-SOLICITATION

**From:** Henry Perkins <[REDACTED]>  
**Sent:** Friday, August 25, 2023 11:19 AM  
**To:** [REDACTED] CIV USN NAVSURFWARCEN COR CA (USA)  
<[REDACTED]@us.navy.mil>  
**Subject:** [Non-DoD Source] Request for SDVOSB Set-Aside: Pre-Solicitation [REDACTED]  
- Cyber Engineering & Digital Transformation Services

Dear Ms. [REDACTED],

I hope this email finds you well. I'm Henry Lee Perkins, founder of Wild Monkey, LLC, a branding agency specializing in digital visual communications. As a Navy veteran and creative professional, I'm interested in the Cyber Engineering and Digital Transformation opportunity highlighted in pre-solicitation [REDACTED] by the Naval Warfare Center Corona Division.

Our team's expertise aligns well with the draft Statement of Work (SOW) for the Digital Visual Communications Portfolio. We're equipped to fulfill the outlined requirements effectively, blending graphic design services with cyber engineering knowledge.

Our commitment to quality and innovation resonates with the SOW's goals. As a Service-Disabled Veteran-Owned Small Business (SDVOSB), and minority owned small business, we're keen to contribute diversely. Please consider a SDVOSB socioeconomic set-aside to promote both diversity and meaningful project involvement.

We have attached a Capability Statement which includes industry commentary on the SOW draft, bid support details, and past performance information.

Thank you for considering our interest and for the dedication you and your team put into these crucial initiatives. We look forward to the possibility of collaborating with the Navy on this project.

Best regards,

## ASKING QUESTIONS



**Ariel Davis**

to [redacted] ▾

Hello Ms. Labruna

I hope this email finds you well. My name is Ariel Davis and I am the CMO for Wild Monkey, LLC, a branding firm based in Little Elm, Texas.

We are preparing to submit a quote in response to Notice ID: [redacted]  
Elder Veterans Suicide Prevention Training Video

When you have a moment, would you please provide some additional context concerning the dramatized portion of the SOW?

Specifically, we would appreciate clarification on whether the VA's vision is firmly established, or if there exists some leeway for creative interpretation. Are these concepts locked in on your end? Our foremost concern centers around striking the right balance, as we want to avoid veering into an overly theatrical or contrived direction that might inadvertently lessen the video's impact.

Your guidance and insights would be immensely valuable as we prepare our quote. We believe that aligning our creative approach with your expectations will be pivotal in delivering a training video that resonates effectively with its intended audience.

Thank you for your time and consideration. We look forward to the opportunity to contribute our expertise to this initiative. Should you have any questions or require further information from our end, please do not hesitate to reach out.

Warm Regards,

# PROPOSAL SUBMISSION

✓ Email - [REDACTED] Visual Branding Displays [REDACTED]



Ariel Davis

to [REDACTED]

Dear Ms. [REDACTED],

I hope this email finds you well. We are excited to submit our comprehensive proposal (see attached PDF) in response to the bid solicitation for the [REDACTED] project at [REDACTED]. Our team at Wild Monkey, LLC has put forth dedicated effort and meticulous planning to ensure that our proposal aligns seamlessly with the project's requirements and objectives.

We understand that today marks a significant event for [REDACTED] with the [REDACTED] Processional. We truly appreciate the opportunity to be a part of this project, which holds such importance for the West Point community. We recognize the legacy and significance that the space embodies, and we are committed to contributing our expertise to elevate the visual identity and storytelling within [REDACTED].

Our proposal reflects our unwavering commitment to delivering exceptional design, fabrication, and installation solutions that resonate with the spirit and history of [REDACTED]. We are excited about the potential to collaborate on this endeavor and are eagerly anticipating the opportunity to bring our creative vision to life.

Thank you once again for considering Wild Monkey, LLC for this project. We look forward to the possibility of working closely with the [REDACTED] team to create a truly memorable and impactful experience for the Department of [REDACTED].

Best Regards,

# **SMALL BUSINESS CERTIFICATIONS**

# WHAT IS A SMALL BUSINESS CERTIFICATION?

A Small Business Certification is an official recognition provided by various certifying bodies, including government agencies, minority-centered organizations, and industry groups. These certifications are designed to help small businesses, including those owned by disadvantaged individuals, women, veterans, or located in underutilized areas, to access new contracting opportunities and compete more effectively.

## WHO OFFERS BUSINESS CERTIFICATIONS

While the SBA offers several certification programs aimed at federal contracts, other organizations provide certifications that facilitate business in the private sector or within specific states or cities, enhancing the potential for growth across diverse markets.

Business certifications are offered by several organizations including

- **U.S. Small Business Administration (SBA):** A government agency that supports entrepreneurs with programs like the Woman Owned Small Business (WOSB), HUBZone, and 8(a) Business Development programs, enabling them to qualify for specific government contracts.
- **Minority-Centered Organizations:** Groups like the National Minority Supplier Development Council offer certifications to help minority entrepreneurs secure business opportunities in the private sector.
- **State and City Governments:** Local governments also provide certifications, with contracts usually limited to their specific areas.
- In this guidebook, our main focus will be on SBA Certification programs, specifically how they relate to federal contracting.

## WHY GET CERTIFIED?

Becoming a certified business offers distinct advantages, such as improved visibility against competitors and faster scaling. Certified businesses gain exclusive access to certain government and private-sector contracts, ensuring equal opportunity. Certification also allows for the formation of joint ventures with similar businesses to compete for specific contracts. Furthermore, certified businesses benefit from extra management and technical support, aiding in their growth and success.

- **Exclusive Contract Access:** Secure contracts reserved for certified businesses by the government and private sectors.
- **Joint Venture Opportunities:** Partner with similar certified businesses to bid for exclusive contracts.
- **Enhanced Support:** Receive specialized management and technical assistance to facilitate business growth.





## SMALL BUSINESS SET-ASIDES

The government provides "small business set-asides" to create a level playing field for small businesses in federal contracting. Small business set-asides are special measures to ensure certain acquisitions are awarded exclusively to small business. These can be either full or partial set-asides, allowing only small businesses to participate.

Set-asides come in two forms, **competitive** and **sole-source**

- **Competitive set-asides** occur when a contract is reserved for small businesses if at least two can fulfill the work, typically for contracts under \$150,000. Some of these competitive set-asides are exclusively for small businesses in specific SBA programs such as 8(a), HUBZone, Women-Owned Small Business and Service-Disabled Veteran Owned Small Business.
- **Sole-source set-asides** are issued without competitive bidding, generally when only one business can meet the contract's requirements.

### SBA SET-ASIDES FOR GOVERNMENT CONTRACTING PROGRAMS

 <b>8(a) Business Development</b> The federal government tries to award at least 5% of all federal contracting dollars to small disadvantaged businesses each year.	 <b>HUBZone</b> The federal government tries to award at least 3% of all federal prime contracting dollars to HUBZone-certified small businesses each year.	 <b>Women-Owned Small Business</b> The federal government tries to award at least 5% of all federal contracting dollars to women-owned small businesses each year.	 <b>Service-Disabled Veteran-Owned</b> The federal government tries to award at least 3% of annual federal contracting dollars to service-disabled veteran-owned small businesses.
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*Snapshot 5 SBA Set-asides for government contracting programs*

## GETTING CERTIFIED

Before applying for SBA certifications, you must first establish a profile in the federal government's System for Award Management ([www.sam.gov](http://www.sam.gov)). Your firm will then be assigned a SAM UEI number and MPIN. For help with getting registered in SAM, review the federal contracting section of this guidebook.



After your business has been assigned a SAM UEI number and MPIN, visit the SBA certification site that matches your socio-economic category to begin the certification process.

In general, the SBA certifies for the following categories:

- HUBZone
- Veterans
- Mentor-Protégé Program
- WOSB Program

However, other agencies may certify for other socio-economic categories. Read on for more information about socio economic categories and how to apply.

## **SOCIO-ECONOMIC CATEGORIES**

Select any socio-economic categories which reflect the status of your entity. If applicable, your small business status will automatically be derived from the receipts, number of employees, assets, or megawatt hours, and NAICS codes entered in the Assertions portion of the registration and displayed in the Representations and Certifications portion of this registration.

- Small Business Joint Venture
- Veteran-Owned Business
- Women-Owned Business
- Women-Owned Small Business
- Women-Owned Small Business (WOSB) Joint Venture eligible under the WOSB Program
- Economically Disadvantaged Women-Owned Small Business (EDWOSB) Joint Venture
- Community Development Corporation Owned Firm
- Minority-Owned Business
- Asian-Pacific American Owned
- Subcontinent Asian (Asian-Indian) American Owned
- Black American Owned
- Hispanic American Owned
- Native American Owned

## SBA CERTIFICATION(S)

If your business is minority-owned, woman-owned, or veteran owned, you can apply for certification on the Small Business Administration's website. This can make you eligible for certain grants and contracts.

**To complete your registration for SBA Certifications, you will need the following documents:**

- Unique Entity ID (UEI)
- Employer Identification Number (EIN)
- NAICS Code(s)
- Operating Agreement and all Exhibits if applicable
- Certificate of Filing
- Articles of Incorporation
- Prior Year Tax Information

You must also be up to date on your tax filings or have documentation of a tax extension.

Depending on the Socio-Economic Category that applies to your business, you may apply for one or more of the SBA's certification programs via the link below.

- SBA's 8(a) Business Development Program: <https://certify.sba.gov/>
- SBA's HUBZone Certification: <https://www.sba.gov/federal-contracting/contracting-assistance-programs/hubzone-program>
- Veteran and Service Disabled Veteran Certification: <https://veterans.certify.sba.gov/>
- Woman-Owned Small Business Status (WOSBs) and Economically Disadvantaged WOSBs (EDWOSBs): <https://wosb.certify.sba.gov/>



The SBA's Knowledge Base [WOSB.Certify.sba.gov](https://wosb.certify.sba.gov) contains instructional videos, user guides, and more information.

## SBA HUBZONE PROGRAM

The HUBZone program aims to fuel small business growth in historically underutilized business zones by awarding at least 3% of federal contract dollars annually to HUBZone-certified companies.

Benefits include preferential consideration in government contracts and a 10% price evaluation preference.

To qualify, businesses must be small according to SBA standards, have majority U.S. ownership, have a principal office and 35% of employees residing in a HUBZone area.

### The HUBZone Map

The HUBZone map changed on July 1, 2023, impacting eligibility.

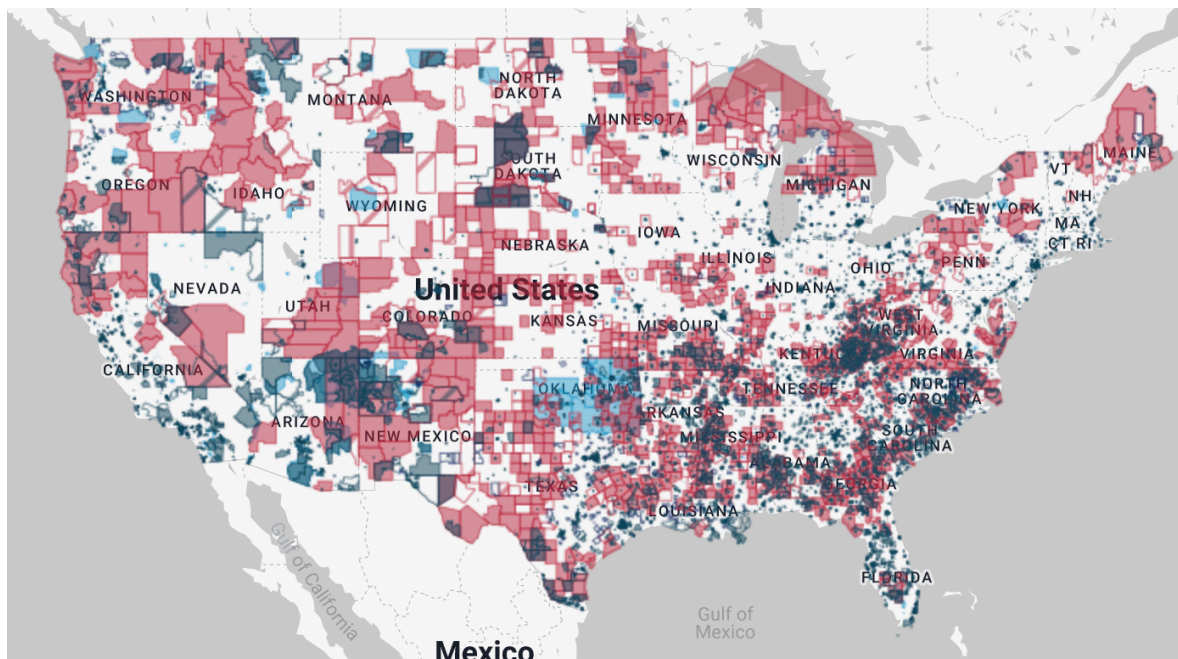


Figure 2 The HUBZone updated July 1, 2023

Businesses must apply for certification through SBA, ensuring compliance with documentation requirements. Recertification is required annually, with no limit on participation duration as long as eligibility is maintained. SBA offers assistance and resources for applicants and certified businesses, including weekly information sessions and support for maintaining eligibility.

## SBA VETERAN SMALL BUSINESS CERTIFICATION (VETCERT) PROGRAM

The SBA's Veteran Small Business Certification (VetCert) program allows veteran-owned small businesses (VOSBs) and service-disabled veteran-owned small businesses

(SDVOSBs) to compete for federal contracts. Certified businesses gain access to sole-source and set-aside contracts, particularly through the VA's Vets First program.

To qualify, businesses must have at least 51% veteran ownership, be registered as small businesses with SAM.gov, and meet SBA's size standards. Benefits include access to federal procurement opportunities, SBA tools, and VA contract set-asides. VOSBs and SDVOSBs can compete for contracts under various socio-economic programs. The SBA offers support through veterans contracting assistance programs and other resources.

Contact SBA VetCert Support for assistance at 800-862-8088 or visit their website for more information.

#### SBA MENTOR-PROTÉGÉ PROGRAM (MPP)

The Mentor-Protégé Program (MPP) facilitates partnerships between small businesses (protégés) and more experienced businesses (mentors) to enhance capacity and win government contracts.

Protégés receive assistance from mentors in various areas such as internal business management, business development, financial assistance, procurement, and strategic planning.

To qualify as a protégé, businesses must be small with industry experience, for-profit or a small agricultural cooperative, and have a proposed mentor.

Mentor businesses must be for-profit or a small agricultural cooperative, possess good character, and be willing and able to provide guidance to the protégé.

Before applying, both businesses must be registered at SAM.gov, decide on the Mentor-Protégé Agreement (MPA), and complete the SBA's online tutorial.

Required documents include a completed Mentor-Protégé Agreement, training module certificates, and proof of experience if applying using a secondary NAICS Code.

## SBA WOMEN-OWNED SMALL BUSINESS CERTIFICATION PROGRAM

The Women-Owned Small Business Federal Contract Program (WOSB Program) aims to create a fair opportunity for women business owners by reserving certain contracts for participation. These contracts target industries where women-owned businesses are underrepresented, with some further restricted to economically disadvantaged women-owned small businesses (EDWOSBs).

SBA manages a list of eligible industries and NAICS codes. Certification under the WOSB Program allows businesses to compete for federal contracts set aside for the program. Eligibility can be determined by answering a few questions on the SBA website.

### How to Apply

To apply for the WOSB certification, all firms will have to use the new, free online certification process at [WOSB.Certify.sba.gov](https://WOSB.Certify.sba.gov), including uploading TPC-certified documentation for processing.

Go to [WOSB.Certify.sba.gov](https://WOSB.Certify.sba.gov) to create a profile and begin an application.



Note: A CAGE code is not required to complete the SBA WOSB certification process.

SBA allows participation from firms certified by the U.S. Department of Veterans Affairs Center of Verification and Evaluations, provided they meet all eligibility requirements.

SBA allows continued participation from businesses that utilize approved Third-Party Certifiers (TPCs) to obtain WOSB or EDWOSB certification.

## OTHER RECOGNIZED CERTIFYING AGENCIES

You may also register for other state certifying agencies like the ones below:

### THE NATIONAL MINORITY SUPPLIER DEVELOPMENT COUNCIL INC.® (NMSDC®)

The National Minority Supplier Development Council Inc.® (NMSDC®) is an organization that focuses on helping a wide range of communities of color who have historically been left out. These communities include Asian-Indian, Asian-Pacific, Black, Hispanic, and Native American individuals.

The NMSDC's influence is significant and goes beyond just managing supply chains. It's all about creating better chances for these communities to succeed. They aim to make sure that more people from diverse backgrounds have the same opportunities as others.

to take part in America's system of open-market business and entrepreneurship. Their main goal is to fix the unfairness in access to opportunities that help people build wealth.

You can register with the National Minority Supplier Development Council to get into Corporate Clients procurement systems as a diverse supplier. This fee is \$500 and takes a few months to process. Most corporate clients are going to want you to be certified through the National Minority Supplier Development Council (NMSDC) or Women's Business Enterprise National Council (WBENC). <http://www.nmsdc.org/mbes/mbe-certification/>

#### NMSDC CENTRAL

NMSDC has implemented a new Online Certification and Re-certification Application, NMSDC Central. To begin the certification process, you will need to visit the website of the regional affiliate closest to your headquarters.

#### Minority Supplier Development Council

There are three regional NMSD affiliates in the state of Texas. They are listed below:

DALLAS/FORT WORTH	SOUTHWEST	HOUSTON
Ms. Margo Posey, President/CEO 8828 N. Stemmons Freeway, Suite 550 Dallas, TX 75247 (214) 630-0747 Email: <a href="mailto:margo@dfwmsdc.com">margo@dfwmsdc.com</a> Web: <a href="http://www.dfwmsdc.com">www.dfwmsdc.com</a>  Serving Metro Dallas - Fort Worth	Ms. Karen Box, President/CEO 912 S. Hwy 183, Suite 101 Austin, TX 78741 (512) 386-8766  Email: <a href="mailto:certification@smsdc.org">certification@smsdc.org</a> Web: <a href="http://www.smsdc.org">www.smsdc.org</a>  Serving New Mexico, Oklahoma and Southwestern Texas	Ms. Ingrid M. Robinson, President/CEO Three Riverway, Suite 555 Houston, TX 77056 (713) 271-7805  Email: <a href="mailto:ingrid.robinson@hmsdc.org">ingrid.robinson@hmsdc.org</a> Web: <a href="http://www.hmsdc.org">www.hmsdc.org</a>  Serving Beaumont, Port Arthur, Corpus Christi, Houston and College Station

#### WOMEN'S ENTREPRENEURIAL OPPORTUNITY PROJECT (WEOP)

WEOP fosters the economic advancement of women of color who are self-employed and small business owners through education, resources, and professional networks. WEOP provides women power, purpose, and a platform through advocating for policies supporting women in business and financial sustainability, increased leadership, and greater civic engagement.

WEOP is great at helping you with Federal Government Contracting strategies. They have training classes for it that take place in partnership with the SBDC UGA at GSU Entrepreneurial Development Center. You can learn more here: [www.weop.org](http://www.weop.org)

## State of Texas Historically Underutilized Business (HUB) Program -

[HTTPS://TEXASHUB.GOB2G.COM/FRONTPAGE/VENDORMAIN.ASP?XID=4695](https://TEXASHUB.GOB2G.COM/FRONTPAGE/VENDORMAIN.ASP?XID=4695)

Texas has awarded billions of dollars in contracts to companies certified as Historically Underutilized Businesses (HUBs). Be ready when opportunity knocks by certifying your minority-, woman- or service-disabled veteran-owned business through the Statewide HUB Program at the Texas Comptroller of Public Accounts.

The goal of the HUB Program is to actively involve HUBs in the Texas procurement process and ensure they receive a fair share of state business. State agencies and universities are required to make a good-faith effort to include HUBs in their purchasing plans. Certified HUBs are listed in the online Texas HUB Directory, and state entities can directly contact a business to buy goods and services for purchases of \$5,000 or less. The Texas HUB Directory is also searched by vendors looking for certified HUBs to include in their subcontracting plans for projects of \$100,000 or more. HUB certification is free of charge and good for up to four years.



Note: Companies that have received their HUB certification through one of the 11 Memorandum of Agreements (MOA's) below will need to recertify for HUB through the MOA organization that they became certified through. You will not need to recertify for HUB through the HUB B2G system.

- City of Austin
- City of Houston
- Dallas/Fort Worth Supplier Development Council
- El Paso Hispanic Chamber of Commerce
- Golden Triangle Minority Business Council
- Houston Minority Supplier Development Council
- South Central Texas Regional Certification Agency
- Southwest Minority Supplier Development Council
- Texas Department of Transportation
- Women's Business Council
- Women's Business Enterprise Alliance

# **EXTRA RESOURCES**



## **SMALL BUSINESS LOANS**

While the primary focus of this book isn't on loans and funding, it's undeniable that securing financial resources forms a critical cornerstone of building a successful business. During my exploration of government grants, I stumbled upon several funding opportunities that, although tangential to our main discussion, are too valuable not to share. This section aims to introduce these resources, offering a concise overview of potential funding avenues that could empower your business journey. It's my way of ensuring that you have access to a broad toolkit, enabling informed decisions as you lay the foundation for your enterprise.

### **CDFI & MICRO LENDERS**

In the realm of financial inclusion, Community Development Financial Institutions (CDFIs) and Micro Lenders stand out as critical sources of support for underserved communities. While both aim to extend financial services to those traditionally excluded, they differ in approach, services, and target markets.

CDFIs offer a broad array of financial products to various underserved groups, leveraging significant funding from multiple sources. In contrast, Micro Lenders focus on providing small-scale loans, primarily to individuals and small businesses lacking access to mainstream financial services, with a strong emphasis on social impact.

## DIFFERENCES BETWEEN CDFI & MICRO LENDERS

The table below summarizes the main operational differences between CDFI Lenders and Micro Lenders:

FEATURE	CDFI LENDERS	MICRO LENDERS
Definition	Specialized financial institutions focusing on underserved markets, including banks, credit unions, and loan funds.	Institutions or programs offering small loans (microloans) to individuals or small businesses without access to traditional credit.
Scope & Services	Provide a range of financial services like mortgage lending, underwriting for community facilities, and business loans.	Focus mainly on microloans to help start-ups, small businesses, or individuals for income-generating activities.
Funding	Funded by federal government programs, private sector, and philanthropic sources to leverage additional private investment.	Often funded by international organizations, private donors, and government grants, focusing on social impact.
Target Market	Serve underserved communities broadly, offering various financial products beyond small loans.	Target individuals and small businesses in need of small-scale financing, especially in disadvantaged areas.



Find your nearest CDFI using Opportunity Finance Network's free online CDFI locator.

Here's a list of 50 CDFI lenders and micro lenders in Texas that serve newly formed small businesses and do not require a minimum revenue for their applicants. The list is divided into two sections: CDFI lenders and micro lenders. [Business Funding Partners.xlsx](#)

# GRANT FUNDING

Grant funding offers non-repayable financial support, easing cash flow and reducing startup risk. Securing a grant enhances a business's credibility, frees up capital for diverse operational needs, and can fund growth initiatives that might otherwise be cost-prohibitive. Additionally, the grant application process can expand your network and provide a competitive edge in the market.

## TYPES OF GRANT FUNDING

Federal vs. State and Local vs. Corporate

### FEDERAL GRANTS

A federal grant is a way the government funds your ideas and projects to provide public services and stimulate the economy. Grants support critical recovery initiatives, innovative research, and many other programs listed in the Catalog of Federal Domestic Assistance (CFDA).

### BEFORE REGISTERING FOR FEDERAL GRANTS

To obtain federal grant funding through grants.gov, you must first register your business on SAM.gov, The System for Award Management. For detailed instructions on registering with SAM.gov, please refer to the Starting GovCon & Grant Foundations section. This will guide you through the process of obtaining your Login.gov account, SAM.gov account, Unique Entity Identifier (UEI), and E-Business Point of Contact (EBiz POC) designation.

To register for a Grants.gov account, you will need an email address, phone number, and your organization's name. Additionally, you must have a Login.gov account to set up and access your SAM.gov account. Once your entity is registered in SAM.gov, you will receive a Unique Entity ID (UEI), which is necessary for creating a Grants.gov account. Be sure to make a note of your designated E-Business Point of Contact (EBiz POC) during the SAM.gov registration process. You'll need it to register on grants.gov.

## What You Need to Create a Grants.gov Account

Organization Name

Email Address

Phone Number

Login.gov Account

Unique Entity ID (UEI)



**Note:** Check Your Organization's Registration. If your business is not new to federal grants, verify if it's already registered on SAM.gov to avoid duplicate accounts. Use the search function on SAM.gov to find your organization and note the UEI.

## Registering with Grants.gov

After obtaining your UEI from SAM.gov, you can create an account within Grants.gov. Within Grants.gov, there are **applicants** and **grantors**. A grant applicant seeks funds, while the grantor provides them. Since you are seeking grant funding, you'll need to create an applicant account on Grants.gov.



### GRANT APPLICANT

A grant applicant is an individual or organization that applies for funding. Applicants submit proposals or applications to receive financial support for various activities, such as research, educational programs, charitable services, or other projects.

### GRANTOR

A grantor is the entity that provides the grant funding. Grantors can be government agencies, private foundations, corporations, or other organizations that have funds available to support specific initiatives or causes. They establish the criteria for grant awards, review applications, and ultimately decide which applicants will receive funding.

When setting up your account for the first time, be sure to use the same email as your EBiz POC from SAM.gov and link your new profile with the UEI you received. This account allows you to manage grant applications and assign administrative roles.



**Note:** If you run into any roadblocks or have questions, the Grants.gov Support Center is at your service. Reach out via email or their support page for personalized guidance.

After creating your Grants.gov account, you can link it to your Login.gov account. This enables you to apply for grants on behalf of your organization.



Congratulations! You just hit a milestone. Now that you have set up your applicant account within grants.gov, you can begin applying for grants for your organization.

### **Applying for Federal Grants**

After you've set up your applicant account within Grants.gov, you can start applying for grants. This process involves writing and submitting a grant proposal. Locating the right funding sources is crucial in grant seeking.

## Quick Links & Grant Resources

### Quick Links

- SAM.gov Entity Registration – <https://www.sam.gov/SAM/>
- Grants.gov Registration – <https://www.grants.gov/>
- Grants.gov Learn Grants – <https://www.grants.gov/web/grants/learn-grants.html>
- Grants.gov Online User Guide – <https://www.grants.gov/web/grants/applicants/applicant-faqs.html>
- Grants.gov Support Center – <https://www.grants.gov/web/grants/support.html>

### Grant Resources

Here are several resources for finding a grantor that funds your project type.

- **GuideStar:** GuideStar offers information about non-profit organizations, including those that provide grants. <https://www.guidestar.org/>
- **GrantWatch:** This site includes a searchable database of grants from foundations, corporations, state, and local governments in the United States. <https://www.grantwatch.com>
- **GrantStation:** GrantStation offers searchable databases of potential funders, including private grantmakers, federal deadline calendar, state funding sources, and international grantmakers. <https://www.grantstation.com/>
- **Philanthropy News Digest RFP Bulletin:** This service, provided by the Foundation Center, offers a list of requests for proposals (RFPs) from foundations and corporations. <https://philanthropynewsdigest.org/rfps>
- **SPIN (Sponsored Programs Information Network):** This is a funding opportunity database, which allows users to search for various types of funding, including grants, fellowships, publication support, sabbatical support, curriculum development, and more. Note: SPIN is a subscription-based service. <https://www.infoedglobal.com/>
- **The Chronicle of Philanthropy:** This is a newspaper that covers the nonprofit world. It also provides a searchable database of grants, including profiles of grant givers and tips for grant seekers. <https://www.philanthropy.com/>
- **Council on Foundations:** This organization represents grant-making foundations and corporations. It offers resources, including a directory of its members, many of whom give grants. (<https://www.cof.org/>)
- **GrantsAlert:** GrantsAlert is a website that collects current grant opportunities for schools in the U.S. <https://www.grantsalert.com/>



My recommended contact: Ms. Jackie Dozier author of THE S-E-X-I Model Guidebook: Confidently Writing Competitive Grant Applications

## **Federal Grant Alternatives for Small Business Funding**

Federal grants for small businesses are usually earmarked for public-serving R&D projects and are not intended for start-up expenses or operational costs.

However, if your business is not eligible for federal grants, state and local governments may also offer grants for specific initiatives, such as expanding childcare facilities or enhancing energy efficiency, utilizing funds allocated by the federal government.

The Small Business Administration (SBA) offers a range of loan programs that can help with these requirements instead. Small business owners should explore these various sources of assistance beyond just direct federal grants.

# APPENDICES



## THANK YOU

Thank you for reading the GovCon Guidebook. Your feedback is crucial as we prepare for the final edition. This unique opportunity allows you to shape the book's content based on your experience. We value your insights on how to improve its clarity, depth, and utility.

Please share your thoughts with us at [ariel@wildmonkeybrand.com](mailto:ariel@wildmonkeybrand.com). Your contribution is key to ensuring the guidebook becomes an indispensable resource for navigating government contracting.

We appreciate your help in making this project a success.

## Connect With Us

If you found this guidebook helpful, let us know by doing any one or all of the following. It would help us out with spreading the word to other business who could use the information.

**WRITE US A  
GOOGLE  
REVIEW**

**CHECK OUT  
OUR OTHER  
BOOKS AND  
MERCH**

**SUPPORT OUR  
MISSION**

## Drop Us a Line!

WHETHER YOU'RE CURIOUS ABOUT STARTING YOUR ENTREPRENEURIAL JOURNEY, DIVING INTO GOVERNMENT CONTRACTING, EXPLORING PARTNERSHIP POSSIBILITIES, OR SEEKING MARKETING ASSISTANCE, I'M HERE TO HELP. YOUR QUESTIONS AND IDEAS ARE WELCOME—DROP ME A LINE AT [ARIEL@WILDMONKEYBRAND.COM](mailto:ARIEL@WILDMONKEYBRAND.COM), AND LET'S START A CONVERSATION!

## Let's Be Social

Join us on our social media platforms to stay connected and continue the conversation. Follow us for more insights, updates, and engaging content.



Facebook: <https://www.facebook.com/WILDmonkeyDESIGN/>



LinkedIn: <https://www.linkedin.com/company/22286715/>



TikTok: <https://www.tiktok.com/@wildmonkeybrand>

# RECORDS WORKSHEET

Keep all your sh\*t in one place. You'll need it when completing the required documents for registering your business within various systems pertaining government contracting.

BRIEF COMPANY DESCRIPTION	
Business Information	
Entity Start Date	
Fiscal Year End Close Date	
Congressional District	
Physical Address:	
Mailing Address:	
Business URL:	
Email:	
TAX INFORMATION	GENERAL
Employer Identification Number (EIN): _____  TAXPAYER ID (TEXAS COMPTROLLER): _____  MOST RECENT TAX YEAR: _____	D&B: _____          
BUSINESS CATEGORY INFORMATION	
<u>PRIMARY NAICS:</u> _____  <u>SECONDADY NAICS:</u> NAICS #2: _____  NAICS #3: _____  NAICS #4: _____ _____	<u>PRIMARY NGIP:</u> _____  <u>SECONDADY NGIP:</u> NGIP #2: _____ NGIP #3: _____ NGIP #4: _____ NGIP #5: _____ NGIP #6: _____ NGIP #7: _____ NGIP #8: _____

NAICS #5: <hr/> NAICS #6: <hr/> NAICS #7: <hr/> NAICS #8: <hr/>		
<b>SIC CODES</b>		<b>P&amp;S CODES</b>
<b><u>PRIMARY SIC:</u></b> <hr/> <b><u>SECONDADY SIC:</u></b> SIC #2: <hr/> SIC #3: <hr/> SIC #4: <hr/> SIC #5: <hr/> SIC #6: <hr/> SIC #7: <hr/> SIC #8: <hr/>		<b><u>PRIMARY P&amp;S:</u></b> <hr/> <b><u>SECONDARY P&amp;S:</u></b> P&S #2: <hr/> P&S #3: <hr/> P&S #4: <hr/> P&S #5: <hr/> P&S #6: <hr/> P&S #7: <hr/> P&S #8: <hr/>
<b>GOVERNMENT CONTRACTING INFORMATION</b>		<b>BANKING INFORMATION</b>
CAGE:		BANK ACCOUNT # <hr/>
UEI:		BANK ROUTING # <hr/>
MPIN		
<b>SOCIAL LINKS</b>		<b>ENTITY STRUCTURES</b>
LinkedIn:		Entity Structure
Facebook/Meta:		Profit Structure
Instagram:		
X/Twitter:		

# GLOSSARY

**LLC (Limited Liability Company)** - A type of business structure that protects the owner's personal assets from the company's debts and liabilities. Texas Secretary of State: <https://www.sos.state.tx.us/>

**EIN (Employer Identification Number) / TIN (Taxpayer Identification Number)** - A unique number assigned by the IRS to businesses for tax purposes.

**IRS (Internal Revenue Service)** - <https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>

**DUNS (Data Universal Numbering System) Number** – A DUNS number is a unique nine-character number used to identify your organization. The Federal Government uses the DUNS number to track how federal money is allocated. If your organization does not yet have a DUNS number, or not sure what it is, please visit the Dun & Bradstreet (D&B) website or call 866-705-5711 to register or search for a DUNS number.  
[Dun & Bradstreet: <https://www.dnb.com/duns-number.html>]

**NAICS (North American Industry Classification System) Code** – A six-digit code that classifies business establishments.  
NAICS Association: <https://www.naics.com/search/>

**National Institute of Governmental Purchasing (NIGP) Code** - The NIGP Commodity and Services Coding System was developed by the National Institute of Governmental Purchasing to bring efficiency to automated purchasing. Each item purchased by the State of Texas is assigned an NIGP Class-Item code.  
View a list of class and item codes used by the state of Texas at the link below:  
<https://comptroller.texas.gov/purchasing/nigp/>

**ID.me** – A service that verifies your identity and ensures the security of your information.  
ID.me <https://www.id.me/>

**Marketing Partner Identification Number (MPIN)** – A Marketing Partner Identification Number is an important code for all SAM registrants to create. The MPIN is nine characters in length, must contain both letters and numbers, and can't have spaces or special characters.

**National Institute of Governmental Purchasing (NIGP) Commodity Codes** - NIGP Commodity Codes are a standardized classification system used in procurement to categorize products and services. It helps agencies and vendors ensure accurate and efficient communication regarding procurement needs and capabilities. You will need these codes to set up your CMBL Account with the TX Comptroller.

**Unique Entity ID** - The Unique Entity Identifier, or the UEI, is the official name of the “new, non-proprietary identifier” that will replace the D-U-N-S® number, according to the General Services Administration (GSA). The UEI will be requested in, and assigned by, the System for Award Management (SAM.gov).

SAM.gov: <https://www.sam.gov/SAM/>

**CAGE (Commercial and Government Entity) Code** - A unique identifier for businesses that want to do business with the government.

SAM.gov: <https://www.sam.gov/SAM/>

**Grant** - A grant is a way the government funds your ideas and projects to provide public services and stimulate the economy. Grants support critical recovery initiatives, innovative research, and many other programs listed in the Catalog of Federal Domestic Assistance (CFDA). Essentially, grants are funds given by the government or other organization that does not need to be repaid.

Grants.gov: <https://www.grants.gov/>

**Catalog of Federal Domestic Assistance (CFDA) –**

**Bid Bond** - A bid bond is a type of surety bond often required in the construction industry or government procurement processes. It is submitted by a contractor or bidder along with their bid to guarantee that if they are awarded the contract, they will enter the contract and provide the necessary performance and payment bonds as required.

**GovCon** - Short for “Government Contracting”

**Fixed-Price Contracts** - when the price is set, the government pays invoices based on the price, not actual cost incurred or hours it took to perform work. The contractor assumes much of the risk because the price is the price. If the contractor determines later their price was too low or they must purchase additional equipment/personnel to fulfill the contract, they can't come back to gov't and ask for a price increase (there are exceptions, but they are "heck" to deal with).

**Cost-reimbursement contracts** - when the government will reimburse the contractor for authorized expenses up to a maximum amount (ceiling). The government assumes much of the risk unless there is a mechanism in place to prevent cost overrun, like shared cost, incentive fee, award fee or fixed fee. This type of contract is limited because the government is prone to not receiving its requirement due to limited funding and cost "creeps".

**Time and materials contracts** - when the government is willing to pay for actual cost of materials (direct and indirect) and direct labor associated with fulfilling contract requirements. Under this type of contract, since the government is only paying for actual cost of materials, there's no markup for the contractor's fee (profit), but the contractor should "consider reasonable overruns, spoilage, or defective work" in their proposal. The contractor's "time" portion is based on labor hours, labor categories and fully burdened labor rates (this takes some research and practice). The contractor's fee (profit) is in their fully burdened labor rates.

**Indefinite delivery/Indefinite quantity (IDIQ) Contracts** - when the government has a need for a specific product or service, but doesn't know exactly when they'll need it nor do they know how much they'll need. This type of contract is usually for a period of time, and when the government identifies an exact amount and date the product or service is needed, they'll place an order against the contract. Also, this type of contract comes with a specific minimum requirement to be purchased. It streamlines the contracting process when a need arises, especially in unforeseen situations like an agency's server shutting down or a natural disaster.

**A "Federal Supply Schedule" (FSS)** - Also known as a "Multiple Award Schedule" (MAS), is a contracting program used by the U.S. General Services Administration (GSA) to streamline the procurement process for federal government agencies. The FSS program establishes long-term government-wide contracts with commercial suppliers, making it easier for federal agencies to acquire a wide range of products and services at pre-negotiated prices and terms.

Under the Federal Supply Schedule program, the GSA negotiates with commercial vendors to create a list of approved suppliers for specific categories of products and services. These categories can cover everything from office supplies and IT equipment to professional services like consulting, training, and engineering.

**Rough Order of Magnitude (ROM)** - A broad estimate that provides a rough idea of the expected cost without precise details.

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Dedicated to my mentor, the Late  
**Gordon Raymond Edwards**  
“The Texas Biz Doc”  
December 16, 1942 - January 20, 2021