

## **8(a) Certification Checklist**

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**INTRODUCTION.** This tutorial provides a summary of the key steps for becoming 8(a) certified by the U.S. Small Business Administration. The information in this article was obtained during an interview with **Mr. Henry W. Washington**, a former manager with the U.S. Small Business Administration and an expert in 8(a) certification. His experience stems from 20 years with the SBA and processing over 1,500 8(a) applications.

This article provides a checklist of the key steps that are involved in becoming 8(a) certified). Though the 8(a) certification may require investing some time and money, the reward is well worth it since it opens the door to accessing the \$200 billion federal procurement market. Being 8(a) certified can also eliminate the tradition delays and red tape by allowing government agencies to make direct (sole source) awards to 8(a) firms for contracts less than \$3 million.

**KEY STEPS.** The 8(a) certification process involves the following key steps:

1. **Orientation.** Attend an 8(a) orientation at your local district office. (See [www.sba.gov](http://www.sba.gov) for a listing of locations)
2. **Application Package.** Complete the 8(a) Application Package you received at the orientation. The total application package will contain 30 to 41 forms that you must complete.
3. **Assistance Decision.** Prospective 8(a) firms must decide if they want to hire a consultant to help them complete the application package.
4. **SBDC Review.** Given the complexity and extent of the 8(a) application package, many prospective 8(a) firms have their local Small Business Development Center (SBDC) review their applications for completeness.
5. **Submit Application.** Once the package is completed, the next step to send it send it to one of the three SBA Offices. The offices are located in Dallas, TX, Philadelphia, PA and San Francisco, CA.
6. **Application Decision.** Once the application is reviewed, the Division of Program Certification and Eligibility (DPCE) decides whether or not to recommend the package approval. The final approval granted by SBA Headquarters in Washington, DC.
7. **Reconsideration.** If the DPCE declines to approve the application, the applicant is allowed 60 days to correct the deficiencies.

8. **Program Entry.** Once SBA Headquarters approves the package, a welcome letter is sent to the new 8(a) that they are a participant in the 8(a) program.
9. **Business Plan.** New 8(a) firms must complete a business plan that discusses how they will market and grow their company over their 9-year period of being 8(a) certified.

**ASSISTANCE RESOURCES.** Given the complexity of the process, many prospective 8(a) firms elect to hire a consultant. Consultants typically provides the following types of services:

- Prepare business plans
- Assist in preparing the application process
- Review the package before submission to the SBA (DPCE Office)
- Help them market their 8(a) status to federal buying agencies
- Assist with preparing for annual reviews

Having a consultant can help save time and money.

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