

# Virginia SBDC

## Management Training Report

### Event Information

| Event Information         |                |             | Center & Event #:             | 70-2023-17   |
|---------------------------|----------------|-------------|-------------------------------|--------------|
| Event Title               | Start Date     | Start Time  | Program                       | Event Status |
| Selling to State Agencies | 10/20/2023     | 10:00:00 AM | SBDC                          | Verified     |
| Site                      | End Date       | End Time    | Sub-Program                   | Reviewed By  |
| LRCC                      | 10/20/2023     | 11:00:00 AM | Not Set                       | ckriz        |
| City, State & Zip         | Sessions       | Total Hours | Entry Person & Date           |              |
| Middletown, VA 22645      | 1              | 1           | ckriz on 12/6/2023 9:21:13 PM |              |
| Event Topic               | Program Format |             | Language                      |              |
| Government Contracting    |                |             | English                       |              |

### Number of Attendees

|                 |             |   |                           |   |                |   |                 |   |
|-----------------|-------------|---|---------------------------|---|----------------|---|-----------------|---|
| Total Attendees | In Business | 2 | Active Duty               | 0 | Asian          | 0 | Native Amer.    | 0 |
| 2               | Disabled    | 0 | Veterans                  | 0 | Black          | 0 | Pacific Island. | 0 |
| Underserved     | Women       | 2 | Service Disabled Vet.     | 0 | North African  | 0 | White           | 2 |
| 2               | LGBTQ       | 0 | Reserve/Nat. Guard        | 0 | Middle Eastern | 0 | Hispanic        | 0 |
|                 |             |   | Spouse of Military Member | 0 |                |   |                 |   |

### Resources Participating

|  |   |   |                           |
|--|---|---|---------------------------|
| <input checked="" type="checkbox"/> SBDC | <input checked="" type="checkbox"/> Educational Institution | <input type="checkbox"/> Online Training Resource | SBA Office: None          |
| <input type="checkbox"/> SCORE           | <input checked="" type="checkbox"/> Chamber of Commerce     | <input type="checkbox"/> SBA District Office      | Other Govt. Agency: Other |
| <input type="checkbox"/> WBC             | <input type="checkbox"/> Trade or Professional Assoc.       | <input type="checkbox"/> Native American Center   | Other: None               |
| <input type="checkbox"/> VBOC            | <input type="checkbox"/> For-Profit Organization            |   |                           |

### Attendee Fees

### Fee Distribution

|                 |             |                 |                      |          |            |                    |
|-----------------|-------------|-----------------|----------------------|----------|------------|--------------------|
| Attendee Count: | Full Fee #  | Discount Fee #  | No Show #            | No Fee # | SBDC       | SCORE              |
|                 | 0           | 0               | 0                    | 2        | \$0.00     | \$0.00             |
| Fee Income \$   | Full Fee \$ | Discount Fee \$ | No Show \$           |          | WBC        | SBA                |
|                 | \$0.00      | \$0.00          | \$0.00               |          | \$0.00     | \$0.00             |
| Other Income \$ | Other \$    |                 | Total Fees Collected |          | Co-Sponsor | Total Distribution |
|                 | \$0.00      |                 | \$ 0                 |          | \$0.00     | \$ 0               |

### Event Notes

### Public Information

|                  |   |                          |
|------------------|---|--------------------------|
| Standard Fee \$  | Web Info: Address,Directions, URL, etc. | Misc. Public Information |
| \$0.00           |   |                          |
| Alternate Fee \$ |   |                          |
| \$0.00           |   |                          |



Power Up Your Business Conference

Selling to State Agencies Breakout Session

Friday, October 20, 2023

|    | <u>Print Name</u> | <u>Company</u>         | <u>Signature</u> |
|----|-------------------|------------------------|------------------|
| 1  | Becky Stickle     | Becky Stickle Coaching | JB CM            |
| 2  | Travis Clower     | FNB Bank               | Travis Clower    |
| 3  | Dave Kent         | Signet Marketing       | Dave Kent        |
| 4  |                   |                        |                  |
| 5  |                   |                        |                  |
| 6  |                   |                        |                  |
| 7  |                   |                        |                  |
| 8  |                   |                        |                  |
| 9  |                   |                        |                  |
| 10 |                   |                        |                  |
| 11 |                   |                        |                  |
| 12 |                   |                        |                  |
| 13 |                   |                        |                  |



## Chris Tran Ley

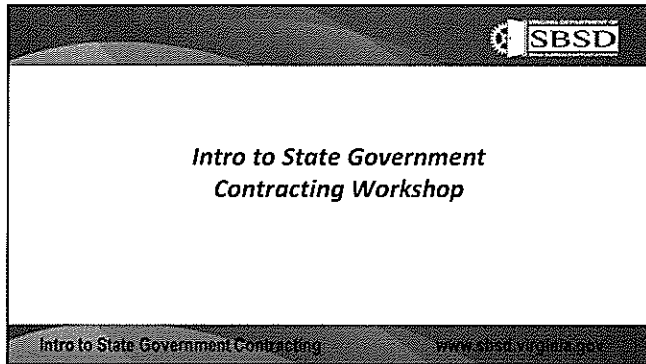
Ms. Ley has worked with small businesses since 2007 when she joined a small, women-owned marketing company, Asian Marketing Services, as their Director of Business Development. She started two new successful small business training programs at Northern Virginia Community College: the SWaM program and the Entrepreneur Roadmap program. In the SWaM program, she helped 32 companies become SWaM certified. Those companies won over \$1.7million in new state and federal contracts. In the Entrepreneur Roadmap program, she helped 30 entrepreneurs start new businesses.

She was a marketing consultant at the Business Development Assistance Group, a non-profit organization dedicated to helping minority business owners. She helped aspiring entrepreneurs and small business owners realize their small business dream by providing assistance with marketing research, strategies and collateral.

In June 2016, she joined the Virginia Department of Small Business and Supplier Diversity as a Business Services Manager covering the Northern Virginia region. She continues to work with aspiring entrepreneurs and small business owners to get them ready and into the Commonwealth of Virginia's procurement system by providing training, workshops, and one-on-one counseling sessions.

Ms. Ley received her undergraduate degree in Accounting from University of Maryland, College Park and her Master's in International Marketing from University of Maryland University College.





1

---

---

---

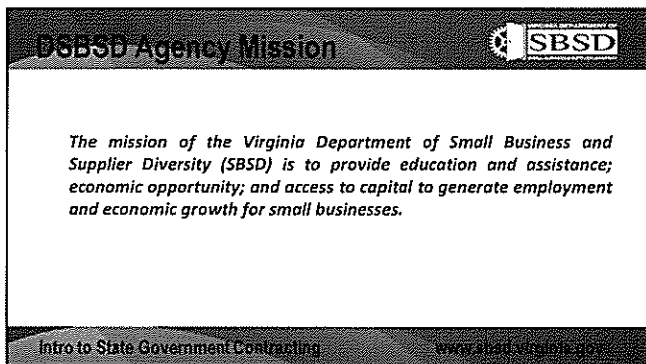
---

---

---

---

---



2

---

---

---

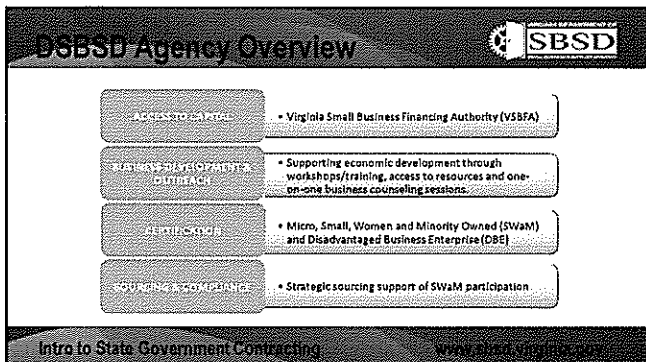
---

---

---

---

---



3

---

---

---

---


---

---

---

---





## Large Purchases

| Purchases over \$100,000  |  |
|---|--|
| <b>Invitation For Bid – IFB</b> <ul style="list-style-type: none"> <li>➤ Competitive Sealed Bidding</li> <li>➤ Specific terms</li> <li>➤ Detailed specifications</li> <li>➤ Awarded based on price</li> </ul> | <b>Request for Proposal – RFP</b> <ul style="list-style-type: none"> <li>➤ Competitive Negotiation</li> <li>➤ Vendor proposes solution</li> <li>➤ Two (or more) offers are selected for negotiation</li> <li>➤ Award is made to best overall proposal</li> </ul> |

Intro to State Government Contracting
[www.sbsd.virginia.gov](http://www.sbsd.virginia.gov)

7

---

---

---


---

---

---

---

---



## What you need to register...

- Federal Employer Identification Number (EIN)
- Virginia Substitute W-9 form
- Commodity Codes

Intro to State Government Contracting
[www.sbsd.virginia.gov](http://www.sbsd.virginia.gov)

8

---

---

---

---


---


---

---

---




[www.eva.virginia.gov](http://www.eva.virginia.gov)





Emergency Procurement Information Related to COVID-19

- E02 Mask Vendor List
- COVID-19 Emergency Vendor List
- FEMA Terms Quick Reference Guide COVID-19
- Emergency Vendor List
- All Other COVID-19 Notices

Intro to State Government Contracting
[www.sbsd.virginia.gov](http://www.sbsd.virginia.gov)

9

---

---

---

---

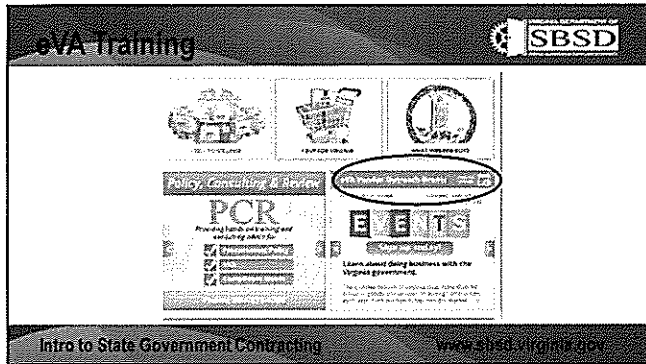
---

---

---

---





13

---

---

---

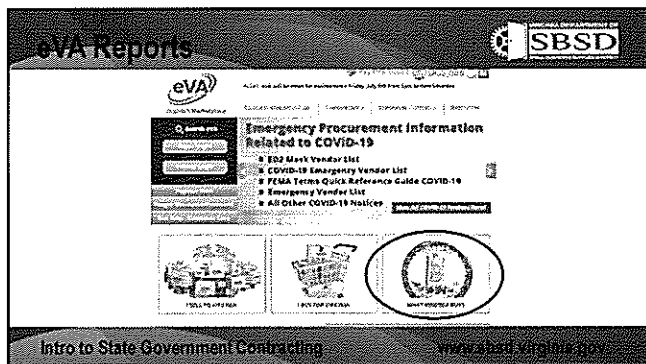
---

---

---

---

---



14

---

---

---

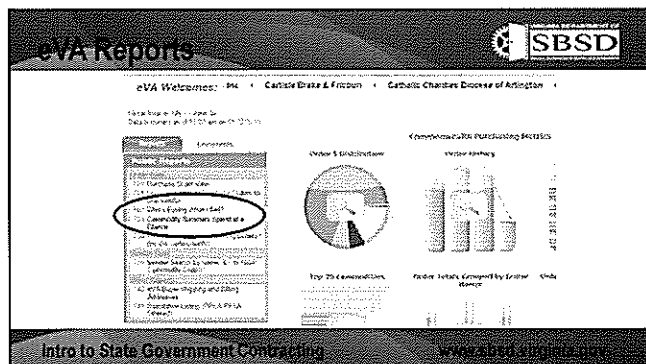
---

---

---

---

---



15

---

---

---

---


---

---

---

---





## SWaM Designations

➤ **Small Business:** No more than 250 employees OR No more than \$10 Million in gross receipts averaged over the 3-year period prior to certification application.

➤ **Women-Owned Business:** At least 51% owned and controlled by one or more women who are U.S. citizens or legal resident aliens.

➤ **Minority-Owned Business:** At least 51% owned and controlled by one or more minorities who are U.S. citizens or legal resident aliens.

➤ **Micro Business Certification:** No more than 25 employees AND no more than \$3 Million in average annual revenue over the 3-year period prior to certification application.

Intro to State Government Contracting

www.sbsd.virginia.gov

19

---

---

---

---

---

---

---

---



## SWaM Designations

➤ SWaM certification is now done online through our Certification application portal.

➤ Paper applications will no longer be accepted.

➤ Standard processing time is 60 business days from receipt of a COMPLETE application.

➤ SWaM certification approval is good for five years.

Intro to State Government Contracting

www.sbsd.virginia.gov

20

---

---

---

---

---

---

---

---



## SWaM Supporting Documents

1. Proof of identification – DMV License
2. Proof of U.S. citizenship or Permanent Residency  
U.S. Passport, Birth Certificate, Permanent Resident Card, or Certificate of Naturalization
3. Documented proof of owner's contributions to the business

Intro to State Government Contracting

www.sbsd.virginia.gov

21

---

---

---

---

---

---

---

---



SWaM Supporting Documents

SBSD

Small Business Support Division

Additional Documents required based on the business formation:

➤ Sole Proprietorship

☐ Current business license

☐ Certificate of Assumed/Fictitious Name

➤ Franchises

☐ Franchise Agreement

➤ Partnerships

☐ Partnership Agreement

Intro to State Government Contracting

www.sbsd.virginia.gov

25

---

---

---

---

---

---

---

---

SWaM Certification Portal

SBSD

Small Business Support Division

<https://certification-app.sbsd.virginia.gov/>

Certification Application

SEARCH

REGISTER

LOG IN

FORGOT YOUR PASSWORD?

Intro to State Government Contracting

www.sbsd.virginia.gov

26

---

---

---

---

---

---

---

---

SWaM Certification Portal

SBSD

Small Business Support Division

Certification Application

SEARCH

REGISTER

LOG IN

FORGOT YOUR PASSWORD?

Intro to State Government Contracting

www.sbsd.virginia.gov

27

---

---

---

---

---

---

---

---



**SWaM Certification Portal**

Progress bar: 1. Designations and Business type

Warning: Please verify that the application is complete and all the documents have been uploaded before submitting the application. The only way to verify the physical document form is to print out all the documents in advance. You may be asked to provide a copy of the documents.

**Designations and Business type**

Select the designation you are registering for:

- ☐ Sole
- ☐ S-corp
- ☐ Partnership
- ☐ Limited liability
- ☐ Non-profit

Intro to State Government Contracting [www.sbsd.virginia.gov](http://www.sbsd.virginia.gov)

31

---

---

---

---

---

---

---

---

**SWaM Certification Portal**

Progress bar: 2. My Profile

Warning: Please verify that the application is complete and all the documents have been uploaded before submitting the application. The only way to verify the physical document form is to print out all the documents in advance. You may be asked to provide a copy of the documents.

**My Profile**

Name: [Field]  
Address: [Field]  
Phone: [Field]  
Email: [Field]  
Social Security Number: [Field]

Intro to State Government Contracting [www.sbsd.virginia.gov](http://www.sbsd.virginia.gov)

32

---

---

---

---

---

---

---

---

**SWaM Certification Status**

To check the status of your application, go to [www.sbsd.virginia.gov](http://www.sbsd.virginia.gov)

What's New

- User Login
- Register
- My Profile
- My Applications
- My Certifications
- My Documents

Intro to State Government Contracting [www.sbsd.virginia.gov](http://www.sbsd.virginia.gov)

33

---

---

---

---

---

---

---

---



**SBDC**  
**Summary of Training Evaluations**  
**(Attach to Form 888)**

**Title of Training:** Selling to State Agencies  
**Date Offered:** 10/20/2023  
**Location:** Middletown

**Analysis of Responses to Question #5: "Overall, the training was worth my time and investment."**

**From ALL Evaluation Forms:**

|   |             |   |          |   |                      |
|---|-------------|---|----------|---|----------------------|
| Number of check marks in Column 1 (Strongly Agree)    | <u>2</u>    | X | <u>5</u> | = | <u>10</u>            |
| Number of check marks in Column 2 (Agree)             | <u>1</u>    | X | <u>4</u> | = | <u>4</u>             |
| Number of check marks in Column 3 (Undecided)         | <u>0</u>    | X | <u>3</u> | = | <u>0</u>             |
| Number of check marks in Column 4 (Disagree)          | <u>    </u> | X | <u>2</u> | = | <u>    </u>          |
| Number of check marks in Column 5 (Strongly Disagree) | <u>    </u> | X | <u>1</u> | = | <u>    </u>          |
| <b>TOTAL SCORE</b>                                    |             |   |          |   | <u><b>14 (a)</b></u> |

|                                       |             |
|---------------------------------------|-------------|
| <b>Total Number of Forms Received</b> | <u>3</u>    |
| <b>Total Number of Attendees</b>      | <u>3</u>    |
| <b>Percentage of Response</b>         | <u>100%</u> |

|                                       |              |             |                              |   |           |                   |
|---------------------------------------|--------------|-------------|------------------------------|---|-----------|-------------------|
| <b>Total Number of Forms Received</b> | <u>3 (b)</u> | X           | <u>5</u>                     | = | <u>15</u> | Maximum Score (c) |
| Divide (a) by (c)                     | =            | <u>93%</u>  | <b>Level of Satisfaction</b> |   |           |                   |
| Divide (a) by (b)                     | =            | <u>4.67</u> | <b>Average Score</b>         |   |           |                   |





## SBDC Training Course Evaluation

**Name of Training Class**    **Selling to State Agencies**

**Date**    **10/20/23**

**Location**    **Middletown, VA**

Your response to this form is very important to us as we strive to bring you the highest quality training available. The information you provide is anonymous and confidential and will be used collectively to evaluate our training program.

Please indicate one response on each line.

|  |           | Strongly Agree | Agree | Undecided | Disagree | Strongly Disagree |
|--|-----------|----------------|-------|-----------|----------|-------------------|
| 1. The seminar gave me a good working knowledge of the subject matter. |           | ✓              |       |           |          |                   |
| 2. The seminar environment was conducive to my learning.               |           | ✓              |       |           |          |                   |
| 3. The handouts were helpful.  |           | ✓              |       |           |          |                   |
| 4. The presenter was knowledgeable on the subject matter.              | Chris Ley | ✓              |       |           |          |                   |
|  |           |                |       |           |          |                   |
| 5. Overall, the training was worth my time and investment.             |           | ✓              |       |           |          |                   |

Additional comments:

Enjoyed learning how to navigate <sup>EVA</sup> ~~the~~ Site and the importance of setting everything up correctly the first time. Thank you!

What other topics you would like to see offered? \_\_\_\_\_





## SBDC Training Course Evaluation

**Name of Training Class**    **Selling to State Agencies**

**Date**    **10/20/23**

**Location**    **Middletown. VA**

Your response to this form is very important to us as we strive to bring you the highest quality training available. The information you provide is anonymous and confidential and will be used collectively to evaluate our training program.

Please indicate one response on each line.

|  |           | Strongly Agree | Agree | Undecided | Disagree | Strongly Disagree |
|--|-----------|----------------|-------|-----------|----------|-------------------|
| 1. The seminar gave me a good working knowledge of the subject matter. |           | ✓              |       |           |          |                   |
| 2. The seminar environment was conducive to my learning.               |           | ✓              |       |           |          |                   |
| 3. The handouts were helpful.  |           |                | ✓     |           |          |                   |
| 4. The presenter was knowledgeable on the subject matter.              | Chris Ley | ✓              |       |           |          |                   |
|  |           |                |       |           |          |                   |
| 5. Overall, the training was worth my time and investment.             |           | ✓              |       |           |          |                   |

Additional comments:

---



---

What other topics you would like to see offered? \_\_\_\_\_





## SBDC Training Course Evaluation

**Name of Training Class**    **Selling to State Agencies**

**Date**    **10/20/23**

**Location**    **Middletown. VA**

Your response to this form is very important to us as we strive to bring you the highest quality training available. The information you provide is anonymous and confidential and will be used collectively to evaluate our training program.

Please indicate one response on each line.

|  |           | Strongly Agree | Agree | Undecided | Disagree | Strongly Disagree |
|--|-----------|----------------|-------|-----------|----------|-------------------|
| 1. The seminar gave me a good working knowledge of the subject matter. |           |                | ✓     |           |          |                   |
| 2. The seminar environment was conducive to my learning.               |           | ✓              |       |           |          |                   |
| 3. The handouts were helpful.  |           | ✓              |       |           |          |                   |
| 4. The presenter was knowledgeable on the subject matter.              | Chris Ley |                | ✓     |           |          |                   |
|  |           |                |       |           |          |                   |
| 5. Overall, the training was worth my time and investment.             |           |                | ✓     |           |          |                   |

Additional comments:

---



---

What other topics you would like to see offered? \_\_\_\_\_