



PALM BEACH COUNTY

O E B O

OFFICE OF EQUAL BUSINESS OPPORTUNITY

SMALL BUSINESS IS BIG BUSINESS



Palm Beach County
Board of County Commissioners

ONLINE CERTIFICATION PROCESS & INSTRUCTIONS



OEBO PROGRAM

Please refer to the Certification 101 Presentation to learn about:

Becoming a
PBC Registered
Vendor

The Mission of
the OEBO

Benefits of
Certification

Certification
Eligibility

Business
Category Size
Standards



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Certification

- Certification is **FREE OF CHARGE**
 - ✓ However, if you wish to expedite, there is a non-refundable charge of \$300. Expedited applications are approved only when the applicant is responding to a solicitation that is a minimum of 20 days from the date of the application request.
- In order to do business with Palm Beach County, all vendors are required to register on the Vendor Self-Service System (VSS)



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Welcome to Palm Beach County's Vendor Self-Service (VSS) Registration System

As a registered vendor with Palm Beach County, VSS provides you with the following features:

Business Opportunities: Construction & Non-Construction Solicitations; Email Notifications of Business Opportunities; Public Access to Business Opportunities

Financial Transactions: View Payment History; Review Currently Held Master Agreements

Vendor Account Maintenance: Addresses; Contacts; Commodity Code Selections (Vendors must select NIGP Commodity Codes for the good(s) and/or service(s) they provide in order to receive email notifications of business opportunities with Palm Beach County.)

Office of Equal Business Opportunity: Small/Minority/Woman Owned Business Enterprise (S/M/WBE) are encouraged to click on the Office of Equal Opportunity (OEBO) link above to learn how to certify their business with Palm Beach County. ALL vendors must be registered in VSS **PRIOR TO** beginning the S/M/WBE Certification process.

For best utilization of the VSS Registration System, please ensure pop-up blockers are disabled and you are using one of the following certified browsers: Internet Explorer, Firefox, Microsoft Edge, Safari, iOS, or Android. Please **DO NOT USE** Google Chrome to complete the Vendor Registration.

For assistance in registering, please use the *VSS New Registration User Guide* to guide you through the registration process. If you are a current vendor, but have not activated your VSS account, please use the *VSS Activate Existing Account User Guide* to complete your account activation.

If you need further assistance, or have questions, **Palm Beach County VSS Assistance** is available Monday through Friday, 8:00am-5:00pm EST and can be reached by calling (561) 616-6800 or email at PBCVendor@pbcgov.org.

Thank you for your interest in doing business with Palm Beach County. We look forward to working with you.

User ID

Password

Login

[Password Reset](#)

Click the Register button to register a new or existing account.

Register

Public Access

Announcements

05/04/2020

ATTENTION VENDORS: Due to the Local State of Emergency, updates made to Vendor Self-Service Accounts will not be processed until May 18, 2020. We apologize for any inconvenience this may cause.

04/23/2020

ATTENTION VENDORS -

Beginning February 3, 2020, ALL Vendors are REQUIRED to enter the following

User Guides and Forms

Click on a form below to either save it to your desktop or open it in Adobe.



[VSS Quick Reference Guide for Solicitations](#)

[VSS Activate Existing Account User Guide](#)



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Online Certification



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After registering as a vendor and obtaining your Vendor Identification number via the email you provided, your next step is to become a Certified S/M/WBE.

Certifying online is a simple process. Please follow the step-by-step instructions below, in order to successfully complete an online application for Certification, Recertification or Modification.

If you need assistance, call the OEBO at 561.616.6840.



ONLINE CERTIFICATION/RECERTIFICATION PROCESS

STEP ONE

Go to the OEBO website
(www.pbcgov.org/oebo) and click on the
Vendor Online Certification button.

Click on this button



Certification Flyer - Creole

Certification Flyer - Spanish

Request an Interlocal Coversheet

How to start a Business

Vendor Online Certification

CONTACT US

Tonya Davis Johnson

Office of Equal Business Opportunity Director
50 S. Military Trail,
Suite 202
West Palm Beach, FL 33415
Phone: 561-616-6840

[Mapquest](#)

[Contact OEBO](#)



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Step by step process to online certification



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A screenshot of the Palm Beach County Vendor Self Service System (VSS) website. The page has a header with "CGI Advantage" and navigation tabs for "PBC Purchasing", "PBC OEBO", and "PBC Vendor Directory". The main content area includes a "Welcome to Palm Beach County" message, a "Register" button, and a login section with fields for "User ID" and "Password". A purple callout box points to the "User ID" field with the text "Vendor User ID". Another purple callout box points to the "Password" field with the text "Password". The page also contains a "Login" button, a "Password Reset" link, and a "Public Access" button. The footer includes a "Register" button and a "Public Access" button.

STEP TWO

You will be taken to the VSS website where you registered as a vendor. Log in using the Vendor User ID and Password you created.



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STEP THREE

Click on the **ORANGE** OEBO Certification Application button to proceed.



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STEP FOUR

After a successful login, you will have three options to choose from. Choose Certification Application.



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Certification Application ...

To apply for certification as Small/Minority/Women Owned Business in Palm Beach County...

[Apply for Certification →](#)



Step by step process to online certification



EBO Vendor Portal

VC0000143032

Home Contact Us

Welcome to Palm Beach County Online Business Portal

Legal Business Name : [Redacted]

DBA Name : [Redacted]

Vendor Code : VC0000143032

Address : [Redacted]

Current Certification Status : [Redacted]

Status Date : 7/19/2019

Your name, address and dba, if applicable, will automatically populate from your VSS record.

Please choose one of the options below

Vendor Self Service ...

To register as a Palm Beach County vendor or access your vendor registration information...

Go to Vendor Self Service →

Vendor Directory ...

Search for vendors registered in Palm Beach County...

Go to Vendor Directory →

Certification Application ...

To apply for certification as Small/Minority/Women Owned Business in Palm Beach County...

Apply for Certification →



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If you have not registered on the VSS...this is what you will see...



Click on Vendor Self-Service to register your business in the Vendor Self Service (VSS) portal



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New
Certifications
Will see this screen

EBO Vendor Portal Home Contact Us VC0000100172

Welcome to Palm Beach County Online Business Portal

Legal Business Name : APEX PRODUCTIONS, INC.
DBA Name :
Vendor Code : VC0000100172
Address :
Current Certification Status :
Status Date :

Please choose one of the options below

- Vendor Self Service ...**
To register as a Palm Beach County vendor or access your vendor registration information...
[Go to Vendor Self Service](#)
- Vendor Directory ...**
Search for vendors registered in Palm Beach County...
[Go to Vendor Directory](#)
- Certification Application ...**
To apply for certification as Small/Minority/Women Owned Business in Palm Beach County...
[Apply for Certification](#)

Select your
contact
information

EBO Vendor Portal Home Contact Us VS0000001636

Select Vendor Contact Details Denotes Required Field

In order to process an application for S/M/WBE certification, a valid Palm Beach County address must be selected. Additionally, an Email Address, Contact Name and Phone Number must be selected from the options below in order to proceed. To add or update missing information, log in to VSS. Updated information will be available the next business day.

* Address :

- 3200 SUMMIT BLVD UNIT 18022, WEST PALM BEACH, FL, 33416
- 5405 Welcraft Dr, Greenacres, FL, 33463-5972
- 8155 BELVEDERRE RD #105, WEST PALM BEACH, FL, 33411
- 8155 Belvedere Rd, Apt 105, West Palm Beach, FL, 33411-6226
- PO Box 18022, West Palm Beach, FL, 33416-8022

* Email Address :

- INFO@TRUPROCLEANING.COM
- info@truprocleaning.com

* Contact Name and Phone # :

- KENA BROWN (561-616-0935)
- KENA BROWN (561-616-0935)
- VMAN CARNEGIE (5616160935)
- VMAN CARNEGIE (5616160935)
- KENA BROWN (5616160935)

[Back to Home](#) [Continue](#)



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Applicants applying for RECERTIFICATION will see this screen



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A screenshot of the EBO Vendor Portal. The header includes the Palm Beach County logo, "EBO Vendor Portal", and a user ID "VS0000001636". Navigation links for "Home" and "Contact Us" are present. The main content area displays the following information:
Welcome to Palm Beach County Online Business Portal
Legal Business Name : TruPro Cleaning, Inc.
DBA Name :
Vendor Code : VS0000001636
Address : 8155 Belvedere Rd Ste 105, West Palm Beach FL 33411
Current Certification Status : Expired
Status Date : 5/5/2019
Below this information, a prompt reads "Please choose one of the options below". There are three main options:
1. "Vendor Self Service ...": To register as a Palm Beach County vendor or access your vendor registration information... with a "Go to Vendor Self Service" button.
2. "Vendor Directory ...": Search for vendors registered in Palm Beach County... with a "Go to Vendor Directory" button.
3. "Renewal Application ...": To renew certification as Small/Minority/Women Owned Business in Palm Beach County... with an "Apply for Renewal" button. This option is highlighted with a red border and a red arrow pointing to the button.

S/M/WBE
Vendors can
recertify before
90 days of
expiration date.
After expiration
a new
certification
application WILL
BE REQUIRED



Step by step process to online certification

Applicants applying for MODIFICATION will see this screen



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The screenshot shows the EBO Vendor Portal interface. At the top, there is a blue header with the Palm Beach County logo and the text "EBO Vendor Portal". Below the header, there are navigation links for "Home" and "Contact Us". The main content area displays a welcome message and a list of user information: Legal Business Name: Total Shredding, LLC; DBA Name: ; Vendor Code: VS0000001979; Address: 3110 Eden Ct, West Palm Beach FL 33411; Current Certification Status: Recertified; Status Date: 6/21/2017. Below this information, there is a prompt: "Please choose one of the options below". There are three main options presented in light blue boxes: 1. "Vendor Self Service ..." with a sub-description "To register as a Palm Beach County vendor or access your vendor registration information..." and a "Go to Vendor Self Service" button. 2. "Vendor Directory ..." with a sub-description "Search for vendors registered in Palm Beach County..." and a "Go to Vendor Directory" button. 3. "Modification Application ..." with a sub-description "To make changes to your Small/Minority/Women Owned business certification details ...". This third option is highlighted with a red border, and its "Apply for Modification" button has a red arrow pointing to it.

ALL supporting documentation for the modification should be uploaded in the documents section.



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AFFIRMATION PAGE FOR ANY APPLICATION



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EBO Vendor Portal

VC0000143032

[Home](#) [Contact Us](#)

AFFIRMATION

I HEREBY SOLEMNLY DECLARE AND AFFIRM THAT I HAVE THE AUTHORITY TO SIGN THIS DOCUMENT ON BEHALF OF THE APPLICANT FIRM NOTED BELOW. I FURTHER DECLARE THAT THE STATEMENTS ON THE ACCOMPANYING CERTIFICATION APPLICATION FORM AND ALL ACCOMPANYING DOCUMENTS ARE TRUE, COMPLETE, AND CORRECT AND INCLUDE ALL MATERIALS NECESSARY TO EXPLAIN THE OWNERSHIP AND OPERATION OF THE APPLICANT FIRM. I AFFIRM THAT ANY INFORMATION CONCERNING THE OWNERSHIP, CONTROL, STRUCTURE, OR OPERATION OF THE APPLICANT FIRM HAVE BEEN FULLY DISCLOSED HEREIN BY ATTACHMENT OR NOTATION.

1 → I Agree Initials: ← 2

[← Back to Home](#)

3 → [Apply for Certification →](#)

1. Click in the “I Agree” checkbox. *(Required)*
2. Click in the “Initials” field and enter your initials. *(Required)*
3. Click on the “Apply for Certification” button. *(Required)*

Step by step process to online certification

VENDOR CONTACT DETAILS

In order to process an application for certification, a valid Palm Beach County address must be selected, as well as an email address, contact name and phone number. **ALL UPDATES AND ADDITIONS MUST BE DONE THROUGH THE VSS.** The OEBO staff is unable to update your information.



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The screenshot shows the "EBO Vendor Portal" interface. The main heading is "Select Vendor Contact Details". Below this, there is a red-bordered box containing the following text: "In order to process an application for S/M/WBE certification, a valid Palm Beach County address must be selected. Additionally, an Email Address, Contact Name and Phone Number must be selected from the options below in order to proceed. To add or update missing information, log in to VSS. Updated information will be available the next business day." The form is divided into three columns: "Address", "Email Address", and "Contact Name and Phone #". Each column has a red arrow pointing to its respective heading. The "Address" column has a single radio button selected for "801 MEADOWS RD STE #101, BOCA RATON, FL, 33488-0636". The "Email Address" column has a radio button selected for "JHOUSE@BELLSOUTH.NET". The "Contact Name and Phone #" column has a radio button selected for "JASON HOUSENBOLD (5613477997)". At the bottom of the form, there is a "Back to Home" button on the left, a red box with the text "You must select (1) option for each category." in the center, and a "Continue" button on the right with a red arrow pointing to it.

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VENDOR CONTACT DETAILS

PLEASE NOTE: The EBO Vendor Portal is only set up to allow Palm Beach County commercial and residential street addresses. The system will automatically “gray-out” any outside of County addresses.



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EBO Vendor Portal

VC0000143032

[Home](#) [Contact Us](#)

Select Vendor Contact Details

* Denotes Required Field

In order to process an application for S/M/WBE certification, a valid Palm Beach County address must be selected. Additionally, an Email Address, Contact Name and Phone Number must be selected from the options below in order to proceed. To add or update missing information, log in to VSS. Updated information will be available the next business day.

* Address :

50 S. MILITARY TRAIL, SUITE 202, WEST PALM BEACH, FL 33415

* Email Address :

asmith1@pbcgov.org

* Contact Name and Phone # :

Angela Smith (561) 616-6840

OEBO@PBCGOV.ORG

Angela Smith (561) 616-6840

[← Back to Home](#)

[Continue →](#)

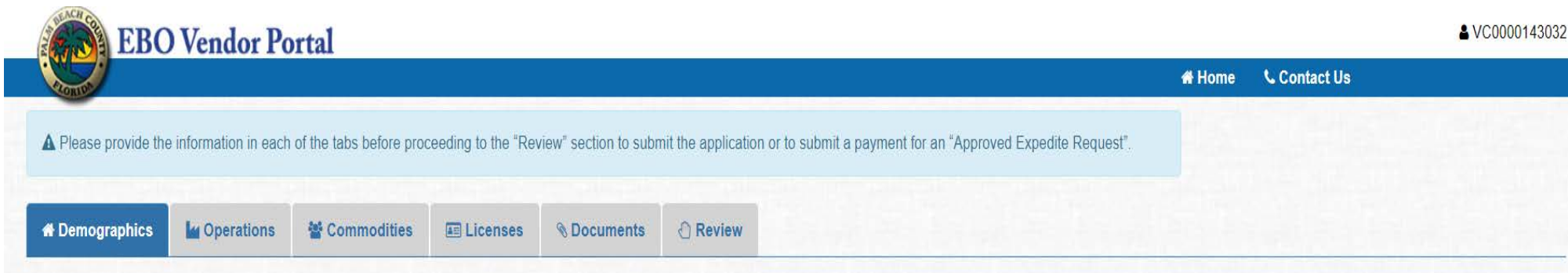


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NECESSARY INFORMATION

This is where all of the necessary information is submitted in your application. You will see tabs (Demographics | Operations | Licenses | Documents | Review).



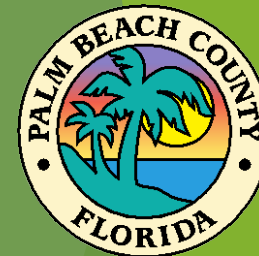
The screenshot shows the EBO Vendor Portal interface. At the top left is the Palm Beach County logo and the text "EBO Vendor Portal". On the right side of the header, there is a user ID "VC0000143032" and navigation links for "Home" and "Contact Us". Below the header is a light blue notification box with a warning icon and the text: "Please provide the information in each of the tabs before proceeding to the 'Review' section to submit the application or to submit a payment for an 'Approved Expedite Request'". Below the notification box is a horizontal menu with six tabs: "Demographics", "Operations", "Commodities", "Licenses", "Documents", and "Review". The "Demographics" tab is currently selected and highlighted in blue.

You will have to select each tab to complete the section of the application it references. Many of the fields are required and will not allow you to continue if not completed.



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ADDING YOUR INFORMATION

There will be tabs that will ask you to INPUT information before you UPLOAD the actual document

EBO Vendor Portal VS0000013112

Home Contact Us

Please provide the information in each of the tabs before proceeding to the "Review" section to submit the application or to submit a payment for an "Approved Expedite Request".

Demographics Commodities **Licenses** Documents Review

Please provide copy(ies) of all current Professional Licenses, Permits or Certificates for your company:

List of Licenses **+ Add License**

License Type	Certification Number	Expiration Date	Qualifier Name	Action
Small Business Certification	1061802	03/31/2022	City of West Palm Beach	
Minority Women Business	1061802	06/27/2022	City of West Palm Beach	
Small Business Enterprise	000000	03/31/2022	School District of Palm Beach County	

The "ADD" button will be at the top right of function display. For example, Adding a License, you will go to "Add License" to open a window, put the information in and select the pencil icon to edit or the trash can icon to delete.



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NECESSARY INFORMATION

After completing the sections you will have to save and continue on.

Demographics Operations Commodities Licenses Documents Review

Operation Details * Denotes Required Field

* Established Date :	<input type="text"/>	Federal ID No (FEIN) :	*****9184
Amount of largest contract to date :	<input type="text"/>	Largest contract amount from whom :	<input type="text"/>
Number of Current Employees: Full Time :	<input type="text"/>	Part Time :	<input type="text"/>
Is Bonded?	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Is Insured?	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Geographic Areas Served - County(s) :	<input type="text"/>	State(s) :	<input type="text"/>
Inventory Avg. Value \$:	<input type="text"/>	Inventory Location(s) :	<input type="text"/>
Inventory Sq. Ft. :	<input type="text"/>		

List Company Affiliates, Subsidiaries, Branches and Divisions: Yes No

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SAVE AND CONTINUE LATER

However, if you need to take a break during the process. You can always log back in and continue where you left off.



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Certification Application ...

To apply for certification as Small/Minority/Women Owned Business in Palm Beach County

[Continue with Certification Application →](#)



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DOCUMENTS CAN BE UPLOADED AS A PDF



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List of Documents

REQUIRED SUPPORT DOCUMENTS FOR SBE CERTIFICATION

Please click on the "Yes" radio button next to each document you upload and submit for your SBE Certification. If the "No" or "N/A" radio button is selected, you will be required to provide an explanation why the document is not being submitted. Incomplete applications will not be processed.

Please respond to all the documents listed below by selecting Yes, No, or N/A.

[📄 - Upload Document](#) [💬 - Enter/View Reason](#) [🔍 - View Document](#)

Yes	No	N/A	Document			
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Year 1 - federal tax returns, as filed with the Internal Revenue Service, including all schedules. If you are a sole proprietor, you must submit personal tax returns that include a Schedule C.			
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Year 2 - federal tax returns, as filed with the Internal Revenue Service, including all schedules. If you are a sole proprietor, you must submit personal tax returns that include a Schedule C.			
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Year 3 - federal tax returns, as filed with the Internal Revenue Service, including all schedules. If you are a sole proprietor, you must submit personal tax returns that include a Schedule C.			
<input type="radio"/>		<input type="radio"/>	Florida Annual Resale Certificate for Sales Tax			
<input type="radio"/>		<input type="radio"/>	Business Tax Receipt(s)			
<input type="radio"/>		<input type="radio"/>	Copy of professional license(s) or Certificate of Competency.			
<input type="radio"/>		<input type="radio"/>	Fictitious name certificate (if applicable).			

Support documents are required for certification review. Just because you mark N/A, does not mean your Specialist will not ask you for it



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EXPEDITE REQUIREMENT



EBO Vendor Portal

▲ Please provide the information in each of the tabs before proceeding to the "Review" section to submit the application or to submit a payment for an "Approved Expedite Request".

Expedited applications will only be approved with certain parameters. A payment of \$300.00 (non-refundable) at the time of your request. Most major methods of payments are accepted. However, in the online application the system informs you what to do in order to make it to the request to expedite. Please follow those instructions.



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REVIEW AND SUBMIT



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EBO Vendor Portal

Please provide the information in each of the tabs below proceeding to the "Review" section to submit the application or to submit a payment for an "Approved Expense Request".

Demographics Operations Commodities Licenses Documents Review

Required Documents information is missing. Click on the documents tab and enter the missing information.

Application Summary

PALM BEACH COUNTY OFFICE OF EQUAL BUSINESS OPPORTUNITY APPLICATION
Certification Type Requested: 18E

Demographics

Legal Business Name: Haskibens LLC
 What/DBA:
 Address: 12145 Bloom Wilson Rd, Jans Beach, FL 33469-2107
 Email: jwaskibens@gmail.com
 Website:

First Name	Last Name	Title	Position	% Ownership	Gender	Race
Blair	Wilson	MR	Managing Member	50	Male	White
Jennifer	Wilson	Mrs.	Managing Member	50	Female	White

Structure: Limited Liability Co. Started At: Second Generation Gender: Female Race: White
 Is the principal owner a citizen of the United States? Y

Contact Name: JENNI FER WILSON Phone: (813) 373-2842 Alt Phone: (813) 747-1134

Industry Classification(s): Other Services

Operations

Established Date: 08/01/2003 Federal ID No.: *****
 Amount of largest contract to date: Largest contract amount from whom:
 Number of Current Employees: Full Time: 12 Part Time:
 Is Bonded: N
 Is Insured: N
 Geographic Area Served: County(s): PBC State(s): Florida
 Inventory Avg. Val: \$1,300.00 Inventory Location(s): on premises
 Inventory Sq. Ft.: 1500 *List Company Affiliates, subsidiaries, branches and divisions (if each additional information if needed): N

Business Divisions:

Commodities

List of major fields of operation under all products sold and/or services offered by your company:

Demographics

Legal Business Name: Haskibens LLC
 What/DBA:
 Address: 12145 Bloom Wilson Rd, Jans Beach, FL 33469-2107
 Email: jwaskibens@gmail.com
 Website:

First Name	Last Name	Title	Position	% Ownership	Gender	Race
Blair	Wilson	MR	Managing Member	50	Male	White
Jennifer	Wilson	Mrs.	Managing Member	50	Female	White

Structure: Limited Liability Co. Started At: Second Generation Gender: Female Race: White
 Is the principal owner a citizen of the United States? Y

Contact Name: JENNI FER WILSON Phone: (813) 373-2842 Alt Phone: (813) 747-1134

Industry Classification(s): Other Services

Operations

Established Date: 08/01/2003 Federal ID No.: *****
 Amount of largest contract to date: Largest contract amount from whom:
 Number of Current Employees: Full Time: 12 Part Time:
 Is Bonded: N
 Is Insured: N
 Geographic Area Served: County(s): PBC State(s): Florida
 Inventory Avg. Val: \$1,300.00 Inventory Location(s): on premises
 Inventory Sq. Ft.: 1500 *List Company Affiliates, subsidiaries, branches and divisions (if each additional information if needed): N

Business Divisions:

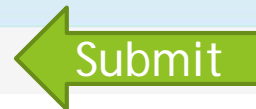
Commodities

List of major fields of operation under all products sold and/or services offered by your company:
 + (000)-MISCELLANEOUS OCCUPATIONAL DIVERSIFICATION 0170: 10115.00

Licenses

List of major fields of operation under all products sold and/or services offered by your company:

Submit



Should you need to edit, there are edit buttons on the side that you can select to edit that portion. Once you have completed, Press Submit.



CERTIFICATION REQUIRED DOCUMENTS CHECKLIST

A written explanation on company letterhead is required for all documents that are not submitted but are applicable to your business. The OEBO reserves the right to request additional information and conduct on-site visits during the certification process. Please note that all documents submitted will become public record. A cursory review of your application is available upon request. **If you do not wish to have your taxes as a part of the public record, you may request to have them reviewed by an OEBO Small Business Specialist.** You may contact the office at 561.616.6840 to schedule an appointment.

FOR ALL APPLICANTS (in addition to your business structure below)

1. Federal Tax returns (and requests for extensions) filed by the firm with related schedules, for the past three years.
2. Federal tax returns (and requests for extensions) for subsidiaries and/or affiliates, including all schedules, if applicable.
3. For Firms in business less than one year, submit opening balance sheet and income statements for months in business.
4. Copies of résumés for owners and directors may be requested.
5. Current Palm Beach County Business Tax Receipt and Municipal Business Tax Receipt, when applicable.
6. Copy/Copies of professional license(s) or Certificate of Competency or permit(s).
7. Fictitious Name Certificate (if applicable).
8. Proof of capital investment (identify investors, types of contributions and amount of contributions).
9. Copy of current executed lease agreement and any addendums or property tax bill.
10. Current list of employee(s) with date of employment/hire and position/title for both full & part-time.
11. Current Reemployment tax form RT-6 or tax form 941.
12. Copies of 1099 for independent contracted employees, if applicable.
13. Largest contract to date, to include the date of the project, the owner of the contract and service rendered.
14. Provide copies of your insurance and/or bonding to include agent/company and capacity/coverage amount.
15. Provide a list of all equipment used to provide the services indicated in your commodity list.
16. Copies of three current: Customer invoices, Signed contracts or Proposals to include date, owner and service rendered.
17. For a provider of Consultant Competitive Negotiations Act (CCNA) Professional Services, submit a copy of your CCNA certification. – Contact the Palm Beach County Department of Engineering at 561-684-4000 for more information.

CORPORATIONS (in addition to 1-17 above, if applicable):

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

LIMITED LIABILITY COMPANIES (LLC), (in addition to 1-17 above, if applicable)

1. Operating Agreement.
2. Membership Units.
3. Ledger.

PARTNERSHIP (in addition to 1-17 above, if applicable)

1. Partnership Agreement.

FRANCHISE (in addition to 1-17 above, if applicable)

1. Franchise Agreement.

SOLE PROPRIETORSHIP (in addition to 1-17 above, if applicable)

1. Most recent three years personal federal tax returns that include a Schedule C and requests for extensions.

The Certification Required Documents Checklist is a part of the paper application found on our website. Items 1-17, if applicable are for all applicants and additional items are necessary based on your Business Structure.

- Corporations
- S Corporation
- C Corporation
- Limited Liability Companies (LLC)
- Partnerships
- Sole Proprietorships



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WHAT DOCUMENTS DO I NEED TO PROVIDE?

- Palm Beach County Business Tax Receipt(s) (BTR) are required (no exceptions). Most municipalities also require a Business Tax Receipt. Check with your city, town or village to see if one is necessary. You will not be able to receive a PBC BTR without one from your municipality.
- **ALL State or County required** professional licenses and certificates applicable to your industry: (Professional, Construction, Retail)
- Proof of Capital Investment (identify investors, types of contributions and amounts).
- Federal tax returns (and request for extensions) filed by the firm with related Schedules, for the past three years. (Sole Proprietors: Schedule C is required; Partnerships: Form 1065)
- Federal Tax returns (and request for extensions) for Subsidiaries and/or Affiliates, including all schedules, if applicable.
 - Tax Review is available: Appointments must be scheduled with the assigned specialist.



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Documents are public record

Palm Beach County Government is subject to the **Sunshine Law** - meaning, any document you submit to us by mail, online, and/or email is available through a public records request.

- If you do not want your financial information (TAX RETURNS) to be made public, notify your assigned OEBO Specialist to schedule an appointment to have your taxes reviewed.
- All Schedules and attachments must be present for all Returns to be reviewed. This also applies to affiliates and/or subsidiary companies. If they are not present at the time of initial review, they may be requested at a later date and subject to the Sunshine Law.
- Once taxes are reviewed by the Specialist, they will be notarized onsite by OEBO staff and returned. An owner, officer or authorized employee of the company must be present to the sign tax review form or they will not be reviewed during the scheduled appointment.
- ALL other documents must be submitted and are subject to the Sunshine Law



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DOCUMENTS NEEDED

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



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DOCUMENTS NEEDED

- Provide copies of your insurance and/or bonding to include agent/company and capacity/coverage amount, if applicable.
- Provide a list of all equipment/supplies used to provide the services indicated in your commodity list.
- Copies of three current customer invoices, signed contracts, or proposals to include date, owner, and service rendered.
- ALL Architects, Engineers, Landscape Architects, or Surveyors and Mappers must provide a copy of your Consultants' Competitive Negotiations Act (CCNA) Professional Services certification received from PBC Department of Engineering. To obtain this certification contact the them at (561) 684-4000, or go to their website: pbcgov.org/engineering/roadwayproduction



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Documents needed for various business structures



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Corporations

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



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Documents needed for various business structures

LLC

- Operating Agreement
- Membership Units
- Ledger

Partnership

- Partnership Agreement (signed and dated document)

Franchise

- Franchise Agreement (signed and dated document)

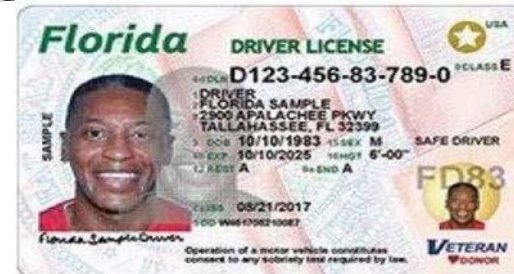


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Additional Documentation Needed for Minority and Women Business Enterprises

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



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CERTIFICATION PROCESS



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



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Is the Certification Process Reciprocal with other agencies?

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



What's Next After Certification?

MARKET YOUR CERTIFICATION

- Attend New SBE Orientation Training.
- Palm Beach County's Library Small Business Resources.
- Participate in outreach activities of local agencies.
- Always check your email for notifications from PBC Purchasing for RFQs, IFBs and RFPs, informing you of bid opportunities on the PBC Purchasing website. Also, check the [PBC Business Opportunities link](#) for all solicitations. This also on the OEBO website.



BUSINESS
opportunities



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Marketing Your Certification

- You can also use OEBO's website to locate other S/M/WBE's by clicking on the Vendor Directory tab.
- Use the internet to check other websites of local, state, and federal agencies for opportunities.
- Attend tradeshows such as Business Matchmaker, join local Chambers to network and market your business, and pass out your business cards.
- Schedule a one-on-one session with an OEBO Specialist to better understand the bidding process, including terms and conditions.



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Contact Information

- **PBC Office of Equal Business Opportunity | S/M/WBE Certification**
50 South Military Trail, Suite 202 | 561.616.6840
www.pbcgov.org/oebo
- **PBC Purchasing Department - Registration | Business Opportunities**
50 South Military Trail, Suite 110 | 561.616.6800
www.pbcgov.org/purchasing
- **PBC Engineering and Public Works Department | CCNA Certification**
2300 N. Jog Road, Suite 3W-33 | 561.684.4150
www.pbcgov.org/engineering/roadwayproduction



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Questions?

Send your questions to the OEBO email
OEBO@pbcgov.org



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