

Top-performing urban school district in Florida

**GROWING. STRONG.**

MORE OF  
EVERYTHING YOU  
WANT FOR  
YOUR CHILD



PALM BEACH COUNTY SCHOOLS  
Your **BEST** Choice!





Top-performing urban school district in Florida



# M/WBE CERTIFICATION REQUIREMENTS

- Complete Certification/Recertification Application, and
- Mail or Fax the following:

## Partnership / Joint Venture

- Partnership Agreement
- Buy-out Rights Agreement
- Profit Sharing Agreement
- Proof of capital invested

## Limited Liability

- Membership Certificate or Owner Statement
- Proof of Capital Investment and source of Start-up or Buy-out Capital
- Bank Signature Card or Signatory Cards

## Corporation

- Affidavit of Certification
- Corporate By-laws
- Proof of Capital Investment and source of Start-up or Buy-out Capital
- Bank Signature Card or Signatory Cards
- Copy of last annual statement filed with the Florida Secretary of State, Division of Corporation

## Sole Proprietorship

- Signed Statement of Ownership



'Relevant Market Area' includes Palm Beach, Broward, and Miami Dade County



ALL business types must submit the following (incl. Sole Proprietorship, Partnership/Joint Venture, Limited Liability, and Corporation):

- State of Florida Business License (incl. Occupational License and Certifications)
- Resume(s) of company principal(s) and key employees showing education, training and employment history
- Prior **3 years** federal tax returns or federal corporate tax returns (incl. all Schedules)
- Last year's financial statement prepared by an independent CPA or Accountant (not applicable to Sole Proprietorship)
- Proof of Ethnicity
- Citizenship status
- Proof of domicile for Primary Business
- Articles of Incorporation (not applicable to Partnership/Joint Venture and Sole Proprietorship)

Specific business types must submit additional information (refer to left)

## CONTACT:

The School District of Palm Beach County  
 Office of Diversity in Business Practices  
 3300 Summit Blvd.  
 West Palm Beach, FL 33406  
 (561) 681-2403 Telephone  
 (561) 434-7405 Fax  
[palmbeachschools.org/diversityinbusiness/](http://palmbeachschools.org/diversityinbusiness/)

MORE OF  
EVERYTHING YOU  
WANT FOR  
YOUR CHILD



# SBE CERTIFICATION REQUIREMENTS

- Complete Certification/Recertification Application, and
- Mail or Fax the following:

## Limited Liability

- Copy of Management Agreement, if applicable
- Certificate of Conversion, if applicable

## Partnership / Joint Venture

- Partnership Agreement
- Profit Sharing Agreement
- Proof of capital invested

## Corporation

- Minutes of corporate meetings (incl. minutes showing election of current officers)
- Corporate by-laws (incl. attachment, if any)
- **Copy** of Stock Certificate(s) issued, if applicable (no specimen copies)
- Stock Ledger, if applicable
- Proof of stock purchase, if applicable
- Copy of last annual statement filed with the Florida Secretary of State Division of Corporation

Specific business types must submit additional information (see above)

Corporations & Partnerships (if applicable) must also submit Agreements related to:

- Stock & Ownership Options
- Buy-out & Stockholder Voting Rights
- Restrictions on Disposal of Stock Loans & Stockholders
- Ownership of Voting Securities
- Facts pertaining to the Value of Shares



'Relevant Market Area' includes Palm Beach, Broward, and Miami Dade County

**GROWING. STRONG.**

**ALL business types must submit:** (incl. Sole Proprietorship, Partnership/Joint Venture, Limited Liability, and Corporation):

- State of Florida Business License (incl. Occupational License and Certifications)
- Resume(s) of company principal(s) and key employees showing education, training and employment history
- Prior **3 years** federal tax returns or federal corporate tax returns (incl. all Schedules)
- Last year's financial statement prepared by an independent CPA or Accountant (not applicable to Sole Proprietorship)
- Articles of Incorporation (incl. date State approved and any subsequent amendments; **not applicable to Partnership/Joint Venture and Sole Proprietorship**)
- Copies of 3<sup>rd</sup> Party Agreements, if applicable (i.e., rental or management service, etc.; **not applicable to Sole Partnership and Partnership/Joint Venture**)

## CONTACT:

The School District of Palm Beach County  
Office of Diversity in Business Practices  
3300 Summit Blvd.  
West Palm Beach, FL 33406  
(561) 681-2403 Telephone  
(561) 434-7405 Fax  
[www.palmbeachschools.org/diversityinbusiness/](http://www.palmbeachschools.org/diversityinbusiness/)



# Minority/Women-Owned Business Enterprise

On May 11, 2005, the School Board adopted Policy 6.143, "[Diversity and Equitable Utilization in Business](#)". The policy provided direction for the establishment of a [narrowly tailored](#) Minority/Woman-owned Business Program. The SBE and M/WBE Program Implementation by Industry Procedures Manual was adopted by the School Board on July 26, 2006.

## M/WBE FACT SHEET

### Eligibility

- Minority Certification (M/WBE) is for firms identified as being owned **51% or more** by a minority or a woman.
- Minority includes: Women-owned, African American, Hispanic American, Asian American and Native American-owned firms.
- Revenues/Sales Size Standards:
  - Any firm with gross sales or revenues of greater than \$2 million per year for professional services; \$3 million per year for procurement; or \$7 million per year for construction services averaged over the last three (3) years shall not be considered eligible to participate in the School District's M/WBE Program.
  - All Minority and Women Business Owners shall be the qualifier/licensor of the firm for which they are seeking certification or re-certification, at the time of the application.

### Application for M/WBE Certification

Applicants that want to be certified as an M/WBE and receive the benefits of the program must apply for certification by completing the M/WBE Application and Affidavit available on the District's Office of Diversity website at: [www.palmbeachschools.org/diversityinbusiness/](http://www.palmbeachschools.org/diversityinbusiness/)

Supporting documentation is **required** for each application and may vary given the legal status of the applying firm. Failure to provide all of the requested information may be grounds for rejection of the application.

Once an application is submitted and all documentation has been received, review will be completed within **60 days**. Should the applying firm meet all of the program criteria; the certificate will be valid for **three (3) years**. If there is a change in ownership interest and/or control for the MWBE or if the firm is no longer in business, the firm must notify the ODBP within 30 days of the change.

#### For more information contact:

The School District of Palm Beach County  
Office of Diversity in Business Practices  
3300 Summit Blvd.  
West Palm Beach, FL 33406

Telephone (561) 681-2403 • Fax (561) 434-7405  
[www.palmbeachschools.org/diversityinbusiness/](http://www.palmbeachschools.org/diversityinbusiness/)

# Small Business Enterprise Program

MORE OF  
EVERYTHING YOU  
WANT FOR  
YOUR CHILD

PALM BEACH COUNTY SCHOOLS  
Your BEST Choice!

On May 11, 2005, the School Board adopted Policy 6.143, "Diversity and Equitable Utilization in Business". The policy provided direction for the establishment of a narrowly tailored Minority/Woman-owned Business Program. The SBE and M/WBE Program Implementation by Industry Procedures Manual was adopted by the School Board on July 26, 2006.

## Eligibility

## Application for SBE Certification

SBE FACT SHEET

- Business received less than \$15 million in contract payments from District projects or contracts in the fiscal year preceding the bid.
- Average annual gross sales are less than fifty (50%) of the small business size standard as defined by the U.S. Small Business Administration for a firm's relevant industry.
- Average number of FT employees over the last three (3) years is less than fifty percent (50%) of small business standards. See Standards at: <http://www.sba.gov/size/>.
- Principal place of business must be in the Metropolitan Statistical Area (MSA); a majority of the firm's gross revenues or sales must be derived therein; and, majority of the firm's employees must be domiciled in Palm Beach, Broward, or Miami Dade County.
- Firms currently conducting business with the District are also included.
- Business shall be independent (a freestanding business) and recognized as a separate entity for tax purposes. A business that shares common ownership, space, employees, or other facilities, **may be** considered as a single business for this program without reference to tax status.
- Business must have been established and in operation for at least one (1) full year prior to program application.
- Business's address must include the street number, name of the street, suite number, if applicable, and zip code. P.O. Box alone is unacceptable.

Applicants that want to apply for the SBE Program must complete an application, and the Disclosure Affidavit which can be obtained from the Office of Diversity in Business Practices (ODBP) or Online at: <https://www.palmbeachschools.org/diversityinbusiness/>

The following document is required by the Office of Diversity in Business Practices (See also SBE Certification Requirements Flyer):

- IRS Form 941 and payroll records for the prior 3 years or for whatever period the firm has been in business, if less than 3 years.

The District's overall goal for SBE program participation is fifteen percent (15%). A goal is established for each project. Companies may participate with gross revenues up to:

- \$13 million (Construction)
- \$7 million (Commodities)
- \$6 million (Professional Services)

For more information contact:

The School District of Palm Beach County  
Office of Diversity in Business Practices  
3300 Summit Blvd.  
West Palm Beach, FL 33406  
(561) 681-2403 Telephone  
(561) 434-7405 Fax  
[www.palmbeachschools.org/diversityinbusiness/](http://www.palmbeachschools.org/diversityinbusiness/)