SBR, MBE, VSBE COMBINED LIAISON TRAINING

February 18, 2025

Maryland

GOVERNOR'S OFFICE
OF SMALL, MINORITY & WOMEN
BUSINESS AFFAIRS

SBR, MBE, VSBE COMBINED LIAISON TRAINING February 18, 2025

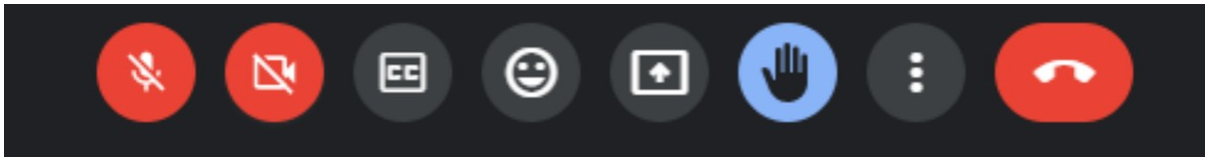
VIRTUAL TRAINING HOUSEKEEPING

Please mute your microphone and turn off video camera during training

Use the chat bar on the right side of your screen or click the raise hand button on the bottom of your screen to make the speaker aware that you would like to ask a question

If follow up questions are requested by the speaker you may unmute and clarify your question at that time

During breaktime, please avoid hanging up, if you can, as this could cause a disruption when we resume goMDsmallbiz.maryland.gov



GOVERNOR'S OFFICE OF SMALL, MINORITY & WOMEN BUSINESS AFFAIRS STAFF

Maria Martinez – Special Secretary

Pamela Gregory -Chief of Staff Laura Gutierrez -Director of Communications & Outreach Davon K. Gardner -Director of Policy & Legislative Affairs Eduardo Hayden -Small Business Outreach Manager Lisa Mitchell Sennaar -SBR Compliance Manager Tanita Johnson -SBR Compliance Manager Danielle N. Davis -VSBE Compliance Manager

GOVERNOR'S OFFICE OF SMALL, MINORITY & WOMEN BUSINESS AFFAIRS STAFF (CONT.)

Gerald Stinnett -MBE Compliance Manager – VLT Operations

Nichelle Johnson -MBE Ombudsman

Tracie Bolden -MBE Ombudsman Karen Reyes -MBE Compliance Manager

Catherine Porterfield – MBE Ombudsman Compliance Manager Shanique Pinder-MBE Ombudsman Compliance Manager Tiara Randolph – MBE Compliance Manager

https://gomdsmallbiz.maryland.gov/Pages/Contact-Us.aspx

SPECIAL SECRETARY MARIA MARTINEZ



AGENDA

SMALL BUSINESS PREFERENCE PROGRAM Overview

PRESENTED BY JAMIE TOMASZEWSKI

DEPUTY CHIEF PROCUREMENT OFFICER, ACTING OSP DGS jamie.tomaszewski@maryland.gov

SMALL BUSINESS PREFERENCE PROGRAM HB0850

COMAR 21.11.01.05

General Procurement questions -central.procurement@maryland.gov

SOCIOECONOMIC OUTREACH PRESENTED BY LAURA GUTIERREZ DIRECTOR OF COMMUNICATIONS & OUTREACH

Why Does Outreach to MBE/SBR/VSBEs Matter?

Our Current Outreach Initiatives: A Foundation to Build Upon

Outreach by the Numbers

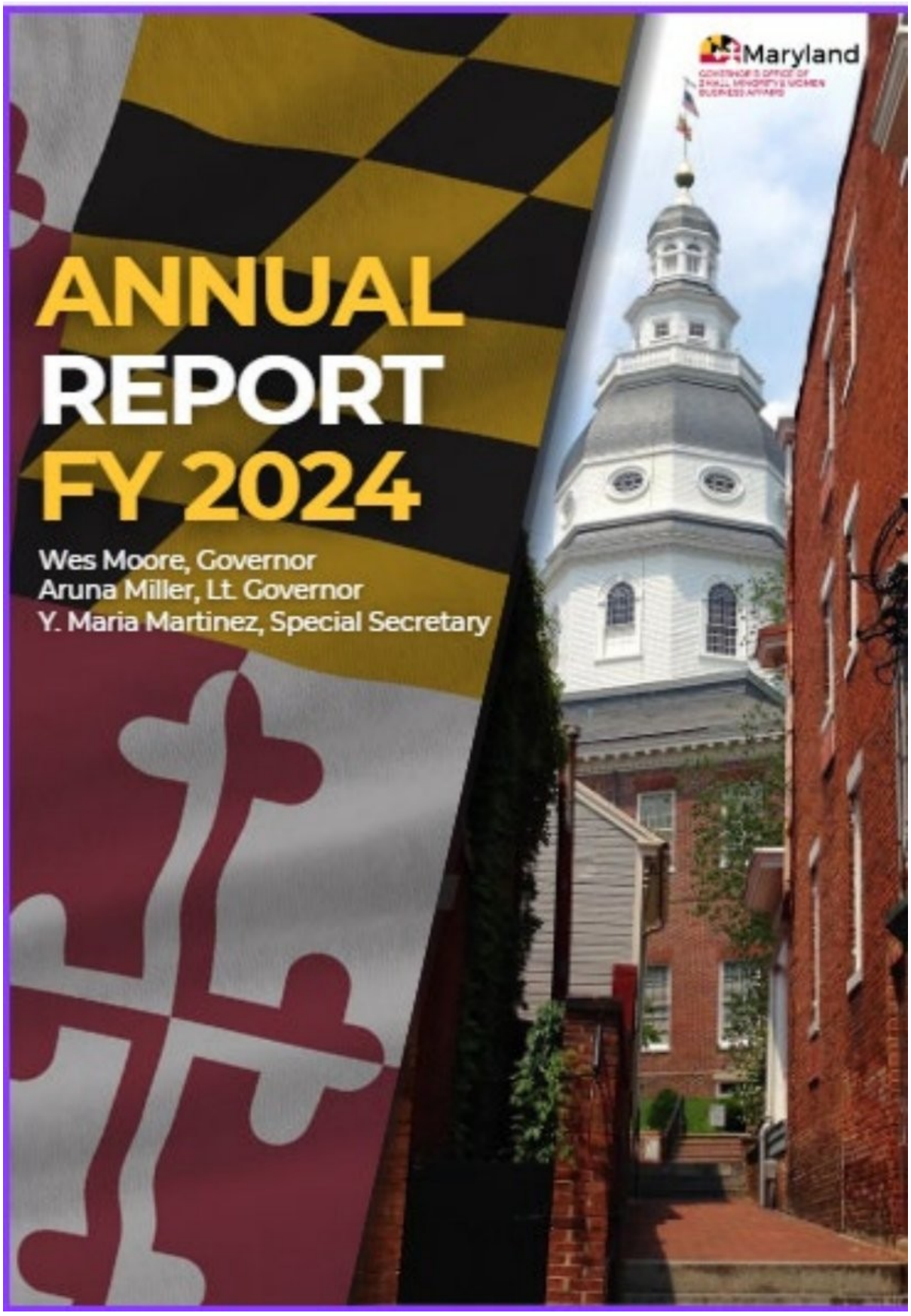
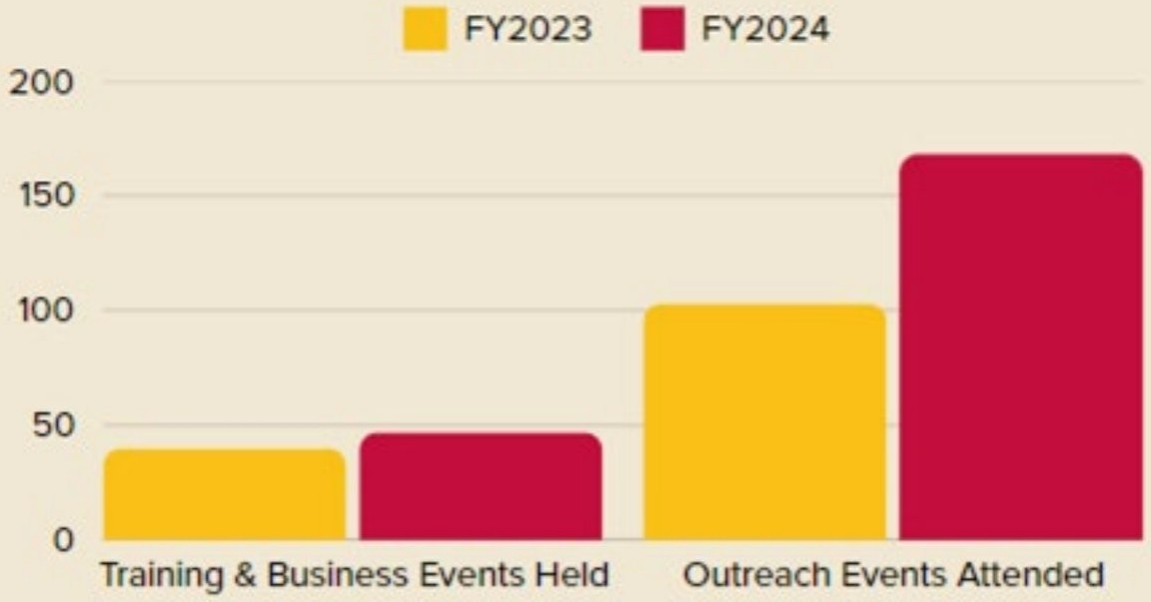


Figure 1: Outreach events hosted and attended comparison between FY23 and FY24



1 **Networking Events**

Bringing people together. Fostering collaboration and relationships.

2 **Online Resources**

Websites, webinars, and social media. Making information accessible.

3 **T.I.P.S. Small Business Webinars**

Guidance and support for small businesses. Growing and scaling.

4 **Certification Workshops**

Helping businesses obtain or renew their SBR/VSBE certifications.

5 **Ready, Set, GROW! Workshops**

Connecting vendors with state buyers for procurement opportunities.

6 **Targeted Engagement**

Ensuring small and diverse businesses are aware of and prepared for procurement opportunities.



Ready, Set, GROW! Procurement Connections Workshops

Ready, Set, GROW! Procurement Connections Workshops

- **Connecting Vendors with State Agencies**:
  - Learn about upcoming procurement opportunities
  - Meet procurement officers and agency buyers
  - Gain insights into Maryland's small business programs
- **Upcoming 2025 Workshops:**
  - **March 20 – Horseshoe Casino, Baltimore**
  - June 10 – MGM Casino, National Harbor
  - September 12 – Rocky Gap Casino, Western Maryland
  - December (TBD)



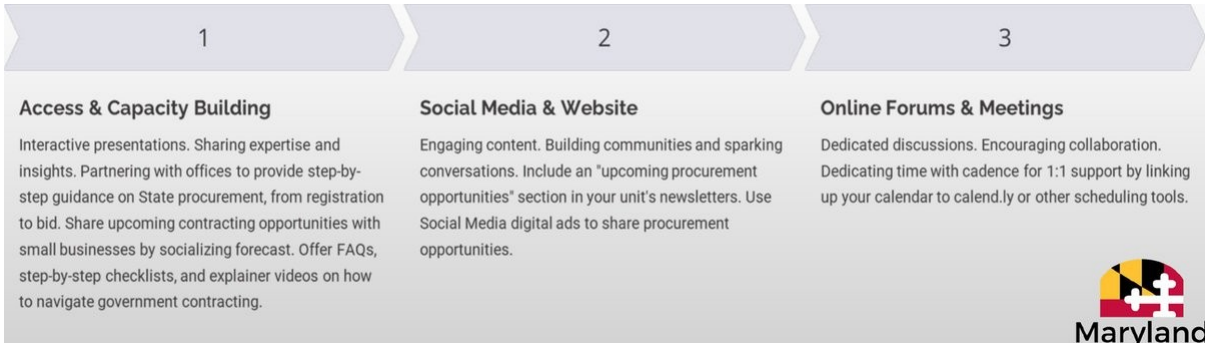
Learn key outreach strategies. These will ensure effective engagement and broader participation. Send any events you are planning to GOSBA Communications & Outreach Team: Laura Gutierrez, laura.gutierrez@maryland.gov and Eduardo Hayden, eduardo.hayden@maryland.gov

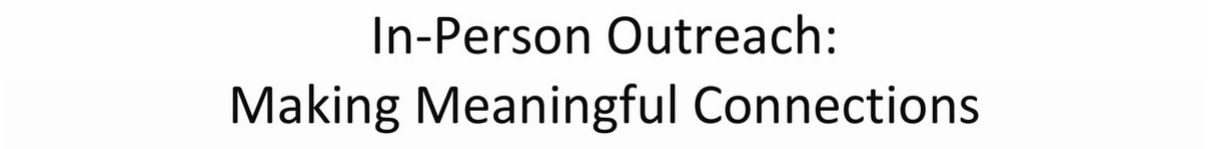
Best Practices in Socioeconomic Procurement Outreach

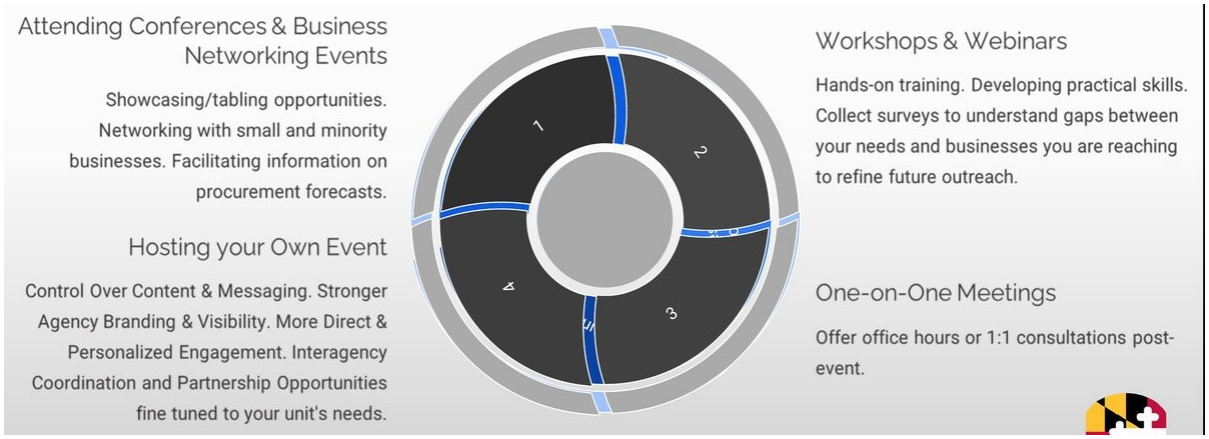
Virtual Outreach Strategies: Maximizing Online Connections

Share your events with GOSBA: Laura Gutierrez Communications & Outreach Director laura.gutierrez@maryland.gov Eduardo Hayden Outreach Manager Eduardo.Hayden@maryland.gov

Next Steps for Outreach:

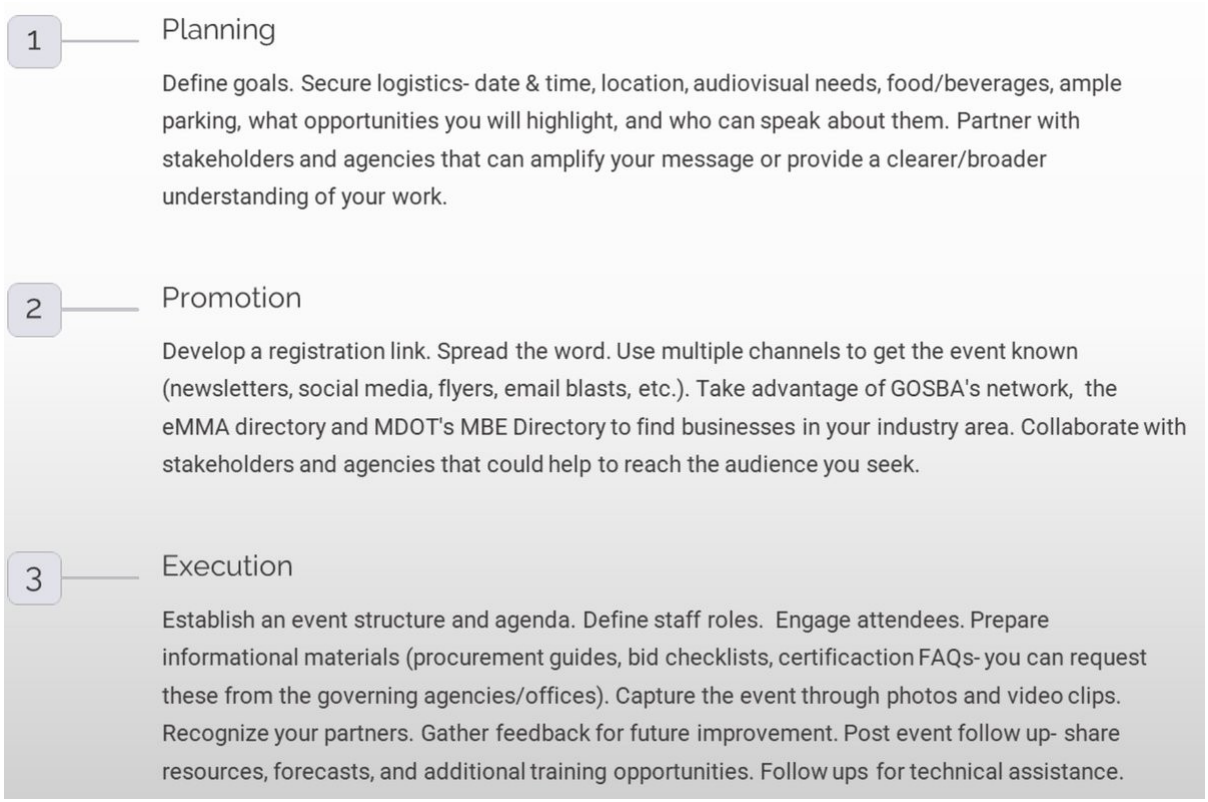






Maximize event participation. Use these events to connect to the right people. Cultivate opportunities.

Attending Procurement Events: Strategic Networking



Host impactful events. Drive small business engagement and increase MBE/SBR/VSBE procurement participation in your unit.

Organizing an Outreach Event Host impactful events. Drive small business engagement and increase MBE/SBR/VSBE procurement participation in your unit.

1 Planning

Define goals. Secure logistics- date & time, location, audiovisual needs, food/beverages, ample parking, what opportunities you will highlight, and who can speak about them. Partner with stakeholders and agencies that can amplify your message or provide a clearer/broader understanding of your work.

2 Promotion

Develop a registration link. Spread the word. Use multiple channels to get the event known (newsletters, social media, flyers, email blasts, etc.). Take advantage of GOSBA's network, the eMMA directory and MDOT's MBE Directory to find businesses in your industry area. Collaborate with stakeholders and agencies that could help to reach the audience you seek.

3 Execution

Establish an event structure and agenda. Define staff roles. Engage attendees. Prepare informational materials (procurement guides, bid checklists, certificaction FAQs- you can request these from the governing agencies/offices). Capture the event through photos and video clips. Recognize your partners. Gather feedback for future improvement. Post event follow up- share resources, forecasts, and additional training opportunities. Follow ups for technical assistance.

Action Plan	Collaboration	Continuous Learning
Develop an outreach strategy. Identify target audiences.	Partner with local organizations. Share resources. Reach out to GOSBA and we can share with our network.	Stay updated on best practices. Embrace innovation. Create new events!

EXECUTIVE ORDER 01.01.2024.38



PRESENTED BY

NICHELLE JOHNSON MBE OMBUDSMAN

EXECUTIVE ORDER

Section D

POs must designate a procurement as SBR if market research indicates that two or

more certified small businesses in the SBR Program are available – eff.

immediately

POs (if operating as the contract managers) must perform annual reviews to

identify compliance with those established contractual MBE and VSBE

participation goals and if necessary, require corrective action plans from prime

contractors – eff. immediately

GOSBA must ensure that performance data is standardized across state agencies and transparently reported.

GOSBA must carry out a feasibility study of taking over ALL preferred provider programs.

GOSBA/MDOT to extend certifications to three years.

GOSBA directed to implement a vendor training program on prime and subcontractor responsibilities and MBE/VSBE forms.

GOSBA must implement a Procurement Officer and Liaison training program regarding compliance and the goal-setting process for all programs

MBE/VSBE forms must be reviewed and updated as needed, annually.

GOSBA must design and administer a Mentor Protégé Program per State Government 9305 GOSBA must commission a study on the effect of the 60% rule on businesses

Work with OSP/MDOT:

- To determine the feasibility of withholding payments to prime contractors related to MBE/VSBE goals
- Requiring attestations from bidder/offerors concerning making a Good Faith Effort to obtain certified small businesses in the preparation of their bid/proposal
- GOSBA directed to develop additional recommendations to strengthen compliance efforts on state contracts with MBE/VSBE goals
- Promulgate regulations related to persistent failure as required by 14-305(c)

Section G Establish agency-level goals for the MBE, VSBE, and SBR Programs Review agency-level goals on an annual basis

Publish an annual report that contains unit goals, statewide goals and each unit's achievement. Section H

Special Secretary of GOSBA to lead the Governor ’s Subcabinet on Socioeconomic Procurement Participation which will

- Identify further statutory and regulatory reforms
- Implement process improvements for the MBE/SBR/VSBE programs
- Study the best practices of other states
- Analyze statewide and procurement unit performance data

Work with OSP to determine the feasibility of increasing the bond requirement threshold to 400K GOSBA will provide outreach and education on any changes to bond requirement thresholds Section K

GOSBA to work with DBM on developing a methodology for the 5% goal for utilizing HBCUs via interagency agreements. Relevant Links: Executive Order 01.01.2024.38 (E.O. link is at the bottom of the press release) HB2025500 Procurement Reform Act of 2025

EXECUTIVE ORDER

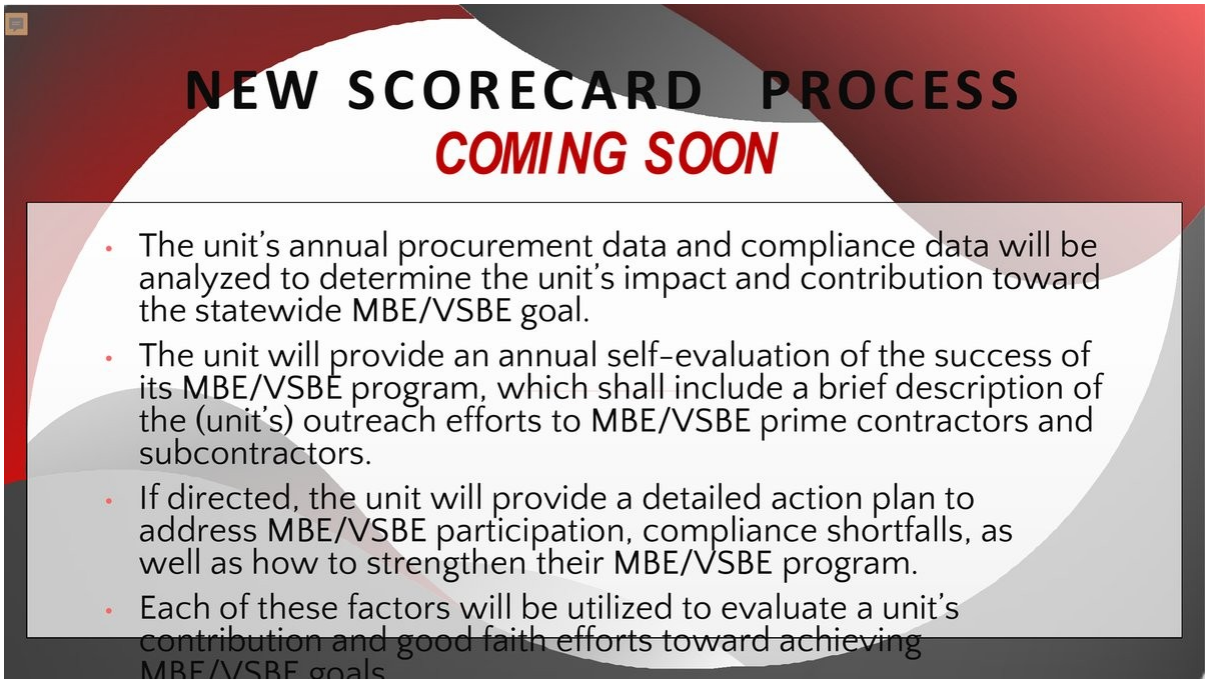
EXECUTIVE ORDER

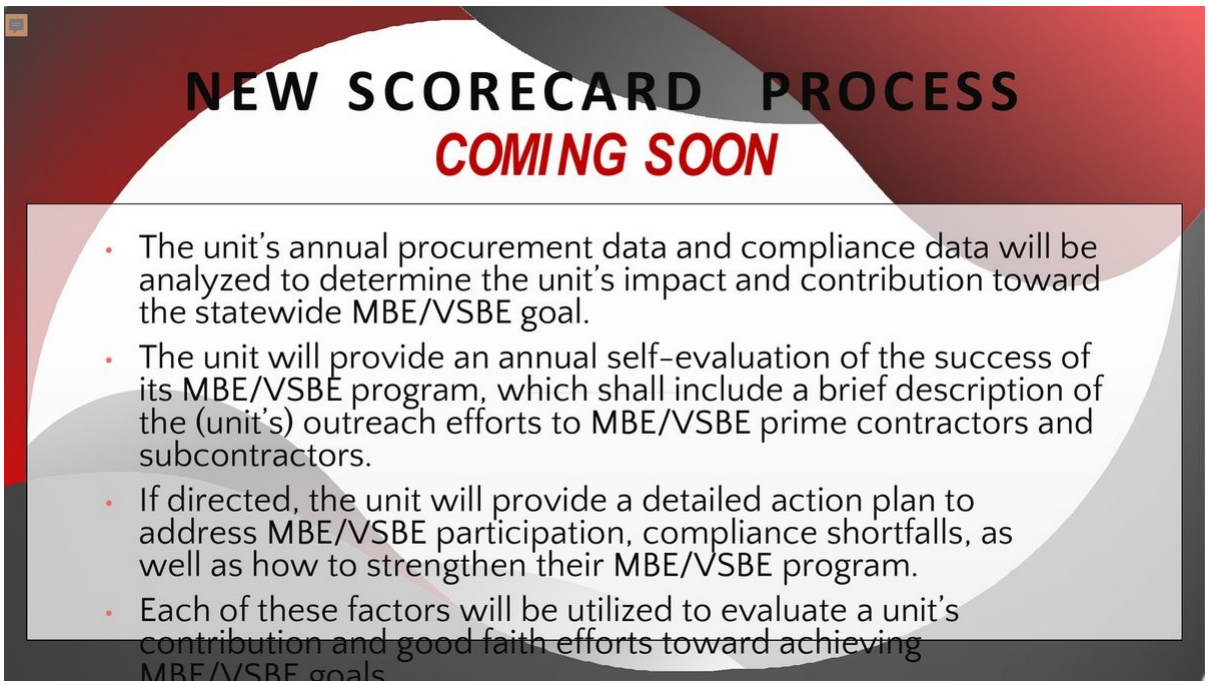
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MBE/VSBE SCORECARD

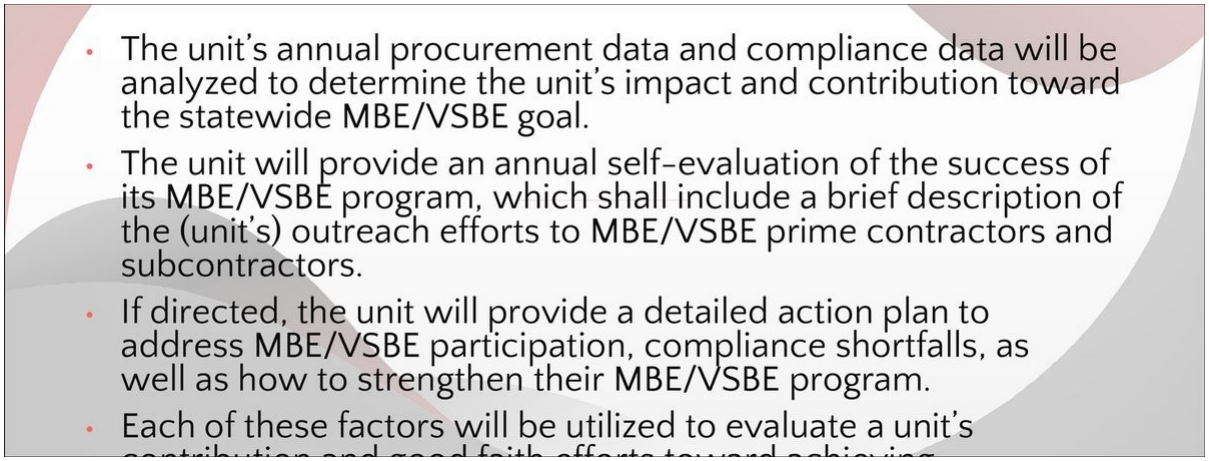
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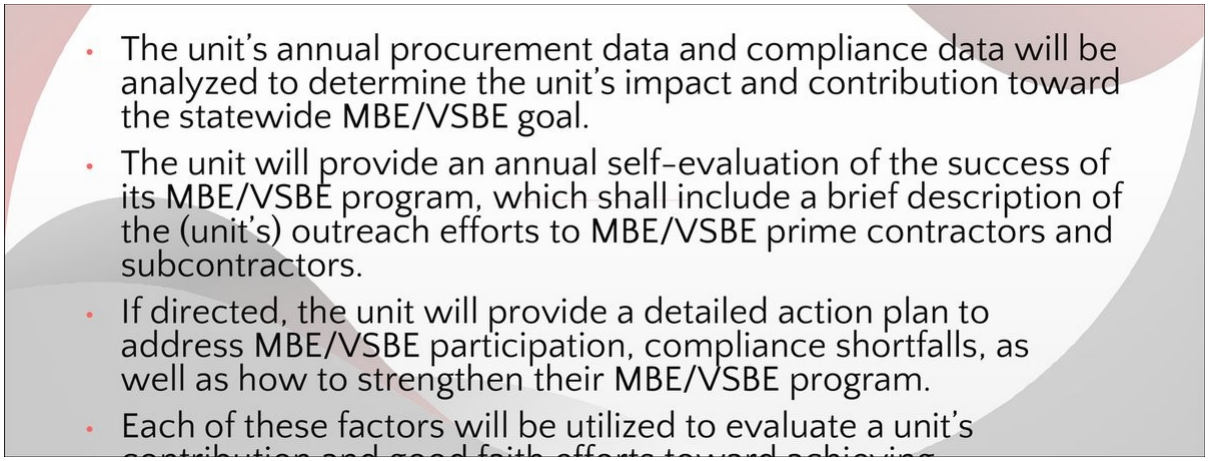
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COMING SOON





The unit's annual procurement data and compliance data will be analyzed to determine the unit's impact and contribution toward the statewide MBE/VSBE goal.
The unit will provide an annual self-evaluation of the success of its MBE/VSBE program, which shall include a brief description of the (unit's) outreach efforts to MBE/VSBE prime contractors and subcontractors.
If directed, the unit will provide a detailed action plan to address MBE/VSBE participation, compliance shortfalls, as well as how to strengthen their MBE/VSBE program.
Each of these factors will be utilized to evaluate a unit's contribution and good faith efforts toward achieving MBE/VSBE goals

SBR, MBE, VSBE Combined Liaison Training

SBR PROgram updates Presented by Tanita Johnson

SBR PROGRAM UPDATES Per Executive Order 01.01.2024.38

Per Executive Order 01.01.2024.38

SBR PROGRAM UPDATES

D. Expanding Participation for Small and Socially and Economically Disadvantaged-owned Business Programs in State Procurement

1. Effective immediately, all Procurement Officers are hereby directed to:

    a. Designate a procurement as SBR if market research indicates that two or more certified small businesses under the SBR program can perform the work or provide the desired goods or services;

SBR PROGRAM UPDATES

Small Business Preference (SBP) Program

The SBP gives another opportunity to increase awards to Certified Small Businesses (CSB).

When a CSB obtains this, you are able to count this participation within the 20% set-aside.

FY24 SBR Report Findings


SMALL BUSINESS RESERVE
SBR
PROGRAM
↑29%
Percent Increase in Certified Vendors
$483M
Payments
10%
Payment Attainment
↑2,400
Vendors Participating

-End of FY24, SBR (CSB) Vendors exceeded 4,900

-Total SBR Payments $483,263,666

-Total SBR Participation 10%

-2,400+ SBR (CSB) Vendors Received Payments

-Awards will be included in reporting for FY25

FY24 SBR REPORT FINDINGS

https://gomdsmallbiz.maryland.gov/Pages/reports.aspx

-Ten units achieved or exceeded the 15% set-aside requirement

-28 units met or exceeded the overall 15% Total SBR Participation target

FY24 SBR REPORT FINDINGS -Ten units achieved or exceeded the 15% set-aside requirement -28 units met or exceeded the overall 15% Total SBR Participation target

FY24 SBR REPORT FINDINGS

https://gomdsmallbiz.maryland.gov/Pages/reports.aspx

FY24 SBR REPORT FINDINGS

Thanks to MD State Police and Motor Vehicle Administration for sharing their best practices & strategies for success!

https://gomdsmallbiz.maryland.gov/Pages/reports.aspx

FY24 SBR REPORT FINDINGS

Their best practices & strategies for success

included the following:

-Attending outreach events and connecting with known vendors--active engagement with small businesses

-Conducting thorough research to identify small businesses

https://gomdsmallbiz.maryland.gov/Pages/reports.aspx

FY24 SBR REPORT FINDINGS

Their best practices & strategies for success

included the following:

-Sharing details of SBR (CSB) certified vendors with procurement team/other departments– streamlining communication

-Designating all applicable procurements as SBR, as per Executive Order

-Reaching the SBR goal

https://gomdsmallbiz.maryland.gov/Pages/reports.aspx

FY25 SBR Reporting

FY25 SBR Reporting

-Thanks to all of the units that submitted their FY25 2nd Quarter SBR Reports!

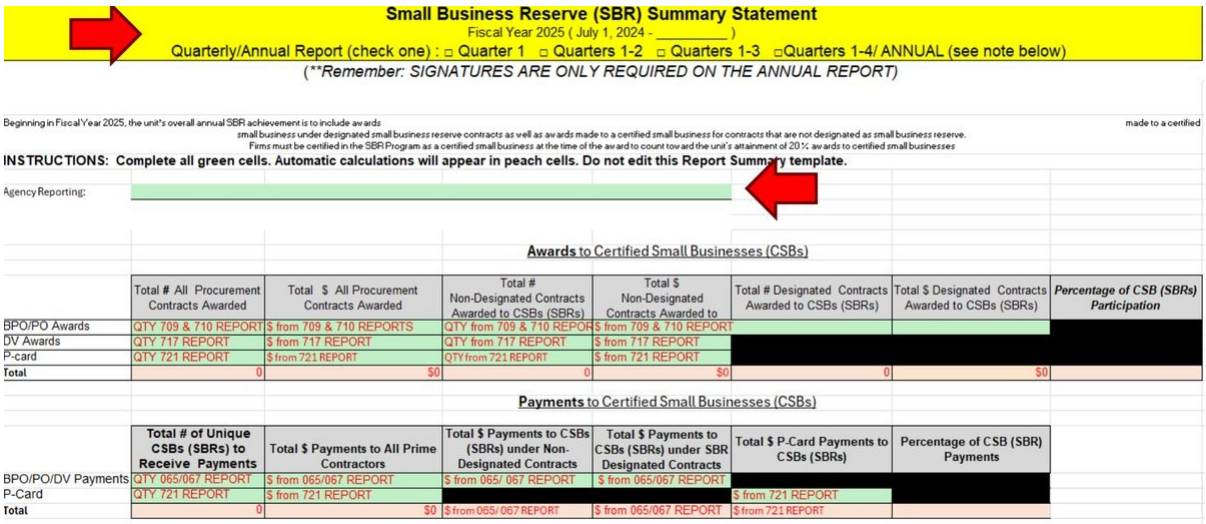
-FY25 SBR Report differs from FY24, awards are now included and the format has changed

-The following slides will share tips with completing the report

(remember that you can contact our office for one-on-one sessions)

FY25 SBR Reporting

New FY25 Format:



Small Business Reserve (SBR) Summary Statement

Fiscal Year 2025 (July 1, 2024 - _____)

Quarterly/Annual Report (check one) : □ Quarter 1 □ Quarters 1-2 □ Quarters 1-3 □Quarters 1-4/ ANNUAL (see note below)

*(**Remember: SIGNATURES ARE ONLY REQUIRED ON THE ANNUAL REPORT)*

Beginning in Fiscal Year 2025, the unit's overall annual SBR achievement is to include awards made to a certified small business under designated small business reserve contracts as well as awards made to a certified small business for contracts that are not designated as small business reserve. Firms must be certified in the SBR Program as a certified small business at the time of the award to count toward the unit's attainment of 20% awards to certified small businesses

INSTRUCTIONS: Complete all green cells. Automatic calculations will appear in peach cells. Do not edit this Report Summary template.

Agency Reporting:

Awards to Certified Small Businesses (CSBs)

	Total # All Procurement Contracts Awarded	Total $ All Procurement Contracts Awarded	Total # Non-Designated Contracts Awarded to CSBs (SBRs)	Total $ Non-Designated Contracts Awarded to	Total # Designated Contracts Awarded to CSBs (SBRs)	Total $ Designated Contracts Awarded to CSBs (SBRs)	*Percentage of CSB (SBRs) Participation*
BPO/PO Awards	QTY 709 & 710 REPORT	$ from 709 & 710 REPORTS	QTY from 709 & 710 REPOR	$ from 709 & 710 REPORT			
DV Awards	QTY 717 REPORT	$ from 717 REPORT	QTY from 717 REPORT	$ from 717 REPORT			
P-card	QTY 721 REPORT	$ from 721 REPORT	QTY from 721 REPORT	$ from 721 REPORT			
Total	0	$0	0	$0	0	$0	

Payments to Certified Small Businesses (CSBs)

	Total # of Unique CSBs (SBRs) to Receive Payments	Total $ Payments to All Prime Contractors	Total $ Payments to CSBs (SBRs) under Non-Designated Contracts	Total $ Payments to CSBs (SBRs) under SBR Designated Contracts	Total $ P-Card Payments to CSBs (SBRs)	Percentage of CSB (SBR) Payments
BPO/PO/DV Payments	QTY 065/067 REPORT	$ from 065/067 REPORT	$ from 065/ 067 REPORT	$ from 065/067 REPORT		
P-Card	QTY 721 REPORT	$ from 721 REPORT			$ from 721 REPORT	
Total	0	$0	$ from 065/ 067 REPORT	$ from 065/067 REPORT	$ from 721 REPORT	

FY25 SBR Reporting

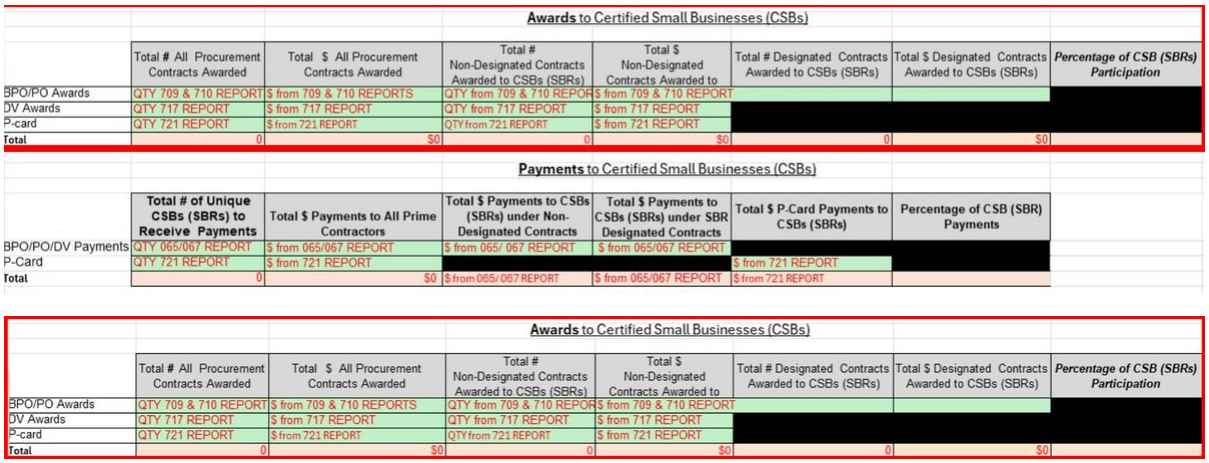
-Be certain to read the SBR Quarterly/Annual Report Instructions provided in the SBR Toolkit

-For the Awards section (Enter data for all fields, even if it is “0”):

>>“BPO/PO Awards”, you can utilize the 709/710 Reports OR 068 Report

>>“DV Awards”, you can utilize the 717 Report

>>“P-Card Awards”, you can utilize the 721 Report



Awards to Certified Small Businesses (CSBs)

	Total # All Procurement Contracts Awarded	Total $ All Procurement Contracts Awarded	Total # Non-Designated Contracts Awarded to CSBs (SBRs)	Total $ Non-Designated Contracts Awarded to	Total # Designated Contracts Awarded to CSBs (SBRs)	Total $ Designated Contracts Awarded to CSBs (SBRs)	*Percentage of CSB (SBRs) Participation*
BPO/PO Awards	QTY 709 & 710 REPORT	$ from 709 & 710 REPORTS	QTY from 709 & 710 REPOR	$ from 709 & 710 REPORT			
DV Awards	QTY 717 REPORT	$ from 717 REPORT	QTY from 717 REPORT	$ from 717 REPORT			
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P-Card	QTY 721 REPORT	$ from 721 REPORT			$ from 721 REPORT	
Total	0	$0	$ from 065/ 067 REPORT	$ from 065/067 REPORT	$ from 721 REPORT	

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BPO/PO Awards	QTY 709 & 710 REPORT	$ from 709 & 710 REPORTS	QTY from 709 & 710 REPOR	$ from 709 & 710 REPORT			
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P-card	QTY 721 REPORT	$ from 721 REPORT	QTY from 721 REPORT	$ from 721 REPORT			
Total	0	$0	0	$0	0	$0	

Refer to SBR Toolkit for additional steps/how to calculate data.

FY25 SBR Reporting

-For the Payments section (Enter data for all fields, even if it is “0”):

>>“BPO/PO/DV Payments”, you can utilize the 065/067 Report

>>“P-Card Payments”, you can utilize the 721 Report

Awards to Certified Small Businesses (CSBs)

	Total # All Procurement Contracts Awarded	Total $ All Procurement Contracts Awarded	Total # Non-Designated Contracts Awarded to CSBs (SBRs)	Total $ Non-Designated Contracts Awarded to	Total # Designated Contracts Awarded to CSBs (SBRs)	Total $ Designated Contracts Awarded to CSBs (SBRs)	*Percentage of CSB (SBRs) Participation*
BPO/PO Awards	QTY 709 & 710 REPORT	$ from 709 & 710 REPORTS	QTY from 709 & 710 REPOR	$ from 709 & 710 REPORT			
DV Awards	QTY 717 REPORT	$ from 717 REPORT	QTY from 717 REPORT	$ from 717 REPORT			
P-card	QTY 721 REPORT	$ from 721 REPORT	QTY from 721 REPORT	$ from 721 REPORT			
Total	0	$0	0	$0	0	$0	

Payments to Certified Small Businesses (CSBs)

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P-Card	QTY 721 REPORT	$ from 721 REPORT			$ from 721 REPORT	
Total	0	$0	$ from 065/ 067 REPORT	$ from 065/067 REPORT	$ from 721 REPORT	

FY25 SBR Reporting

Information found within SBR Quarterly/Annual Report Template:

SECTION 1 (AWARDS)

Certified Small Business (previously SBRs) Awards data should include:

Awards Data	Add in Cell(s) on Report Summary		
Total Number (#) All Procurement Contracts Awarded	*B17 (BPO/PO Awards)*	*B18 (DVs)*	*B19 (P-card)*
Total Dollar Value ($) All Procurement Contracts Awarded	*C17 (BPO/PO Awards)*	*C18 (DVs)*	*C19 (P-card)*
Total Number # Non-Designated Contracts Awarded to CSBs	*D17 (BPO/PO Awards)*	*D18 (DVs)*	*D19 (P-card)*
Total Dollar Value ($) Non-Designated Contracts Awarded to CSBs	*E17 (BPO/PO Awards)*	*E18 (DVs)*	*E19 (P-card)*
Total Number (#) Designated Contracts Awarded to CSBs	*F17 (BPO/PO Awards)*		
Total Dollar Value ($) Designated Contracts Awarded to CSBs	*G17 (BPO/PO Awards)*		

SECTION 2 (PAYMENTS)

Certified Small Business (previously SBRs) Payment data should include:

Payments Data	Add in Cell(s) on Report Summary	
Total Number (#) of Unique CSBs to Receive Payments	*B25 (BPO/PO/DVs)*	*B26 (P-card)*
Total Dollar Value ($) Payments to All Prime Contractors	*C25 (BPO/PO/DVs)*	*C26 (P-card)*
Total Dollar Value ($) Payments to CSBs under Non-Designated Contracts	*D25 (BPO/PO/DVs)*	
Total Dollar Value ($) Payments to CSBs under SBR Designated Contracts	*E25 (BPO/PO/DVs)*	
Total Dollar Value ($) P-Card Payments to CSBs	*F26 (P-Card)*	

FY25 SBR Reporting

Maryland
GOVERNOR'S OFFICE OF SMALL, MINORITY & WOMEN BUSINESS AFFAIRS

Socioeconomic Data Reporting Guidance

This Socioeconomic Data Reporting Guidance is a reporting tool to assist state procurement units in properly identifying reporting exclusions for Small Business Reserve (SBR), Minority Business Enterprise (MBE), and Veteran-Owned Small Business Enterprise (VSBE) participation data reports.

State procurement units are required to submit quarterly and annual participation attainment data to the Governor's Office of Small, Minority & Women Business Affairs (GOSBA). Not all awards and payments can be counted towards the State's socioeconomic procurement programs participation.This guidance was prepared by GOSBA in collaboration with:

- Department of General Services (DGS)
- Office of the Comptroller (COM)
- Department of Budget and Management (DBM)
- GAD List Workgroup members

It is important for report preparers to have a general understanding of the SBR, MBE, and VSBE programs and procurement processes. This guidance is not an absolute list of inclusions and/or exclusions. Report preparers are expected to confer with their unit's procurement team for contract specific details.

Object 06- Fuel and Utilities DO NOT REPORT		
• Some subobject codes in Comptroller Object Code 06 apply to specific circumstances. See below for guidance on how to properly classify line items.		
Fuel and Utilities: The subobject codes in Object 06 that apply to Fuel and Utilities do not fall under procurement practices and are considered expenditures. This **should not be confused** with contracts awarded to vendors to provide plumbing services, electricians, HVAC or fuel contracts.		
Subobject Codes that are exempt per COMAR 21.01.03.01:		
Code	**Definition**	**Notes**
0697- Maryland Environmental Service (MES) Charges	To record payment to the Maryland Environmental Service for operation of facilities	This code is exempt under COMAR 21.01.03.01A(4) Contracts or like business agreements between a State agency and:
0698- Loan Repayment- Energy Conservation Fund	Any loan repayments made to the Energy Conservation Loan Fund.	This code is exempt under COMAR 21.01.03.01A(4) Contracts or like business agreements between a State agency and:

Object 07- Motor Vehicle Operations and Maintenance REPORT	
• Some subobject codes in Comptroller Object Code 07 apply to specific circumstances as noted below.	
Guidance for Vehicle Maintenance, Repair, Fuel, Oil, Gas, and Parts:	
Statewide Contract for Vehicle Maintenance and Repair:	DGS currently has a statewide vehicle maintenance and repair contract with **Element Vehicle Management Services, LLC.** Awards are reported by DGS and payments made towards the statewide are reported by the procurement unit.
Statewide Contract for Fuel Supply and Maintenance Services:	DGS currently has a statewide contract for Oil, Gas, Fuel, and Utilities with **Carroll Independent Fuel Co Inc.** Awards on this statewide contract are reported by DGS and payments made towards this statewide contract are reported by the procurement unit.
Credit Card Transactions for Parts:	There are times procurement units may note transactions on their credit card reports to Autozone or Advanced Auto Parts, or independent auto shops for example. These transactions can be included in your agencies awards and payments.
Subobject Codes that should not be reported (continued on next page):	
Code	**Notes**
0704- Insurance **0713- Insurance** **0723- Insurance** **0733- Insurance**	Insurance is considered an expenditure through the Self Insured Fund and is exempt from procurement practices.

https://gomdsmallbiz.maryland.gov/Pages/Reporting-Tool-

FY25 SBR Reporting

https://www.youtube.com/watch?v=es1B03Y5tgM



FY25 SBR Reporting “Remember to” Items

-Place data within the correct corresponding fields in the Summary Report

-Submit supporting data (you can attach it in additional tabs of the SBR Report or send the separate documents, along with your SBR Report)

-For the Awards section, “BPO/PO Awards”, utilize the 709/710 Reports; OR if you decide not to use those reports for the data, access the 068 Report

-For “DV Awards”, utilize the 717 Report

FY25 SBR Reporting “Remember to” Items

-P-Card data should be listed in both the “Awards” and “Payments” section, as these items are counted as both awards and payments to SBR (CSB) Vendors

-Although designated and non-designated SBR (CSB) awards are now being counted, be sure to continue designating SBR (CSB) opportunities/solicitations

-Refer to the Socioeconomic Data Reporting Guidance when scrubbing data

-Refer to the SBR Toolkit for additional information (SBR Quarterly/Annual Report Instructions and Report Template)

FY25 SBR Reporting Additional information

Contact information Lisa Mitchell Sennaar SBR Compliance Manager lisa.sennaar@maryland.gov (410) 697-9613 (O)

-Procurements between $50,000 and $500,000 are automatically designated as SBR per the Executive Order

(Remember that procurements above $500,000 should also be considered for SBR Designation)

-Procurements between $50,000 and $500,000 that are not designated SBR require a waiver of the SBR designation be submitted to the SBR Waiver Mailbox, following the guidance from PRG Evaluation -SBR Program Designation Worksheets (as listed on the Office of State Procurement (OSP) website)

https://procurement.maryland.gov/procurement-review-group-prg/

Contact information

Tanita Johnson

SBR Compliance Manager

tanita.johnson1@maryland.gov

(410) 697-9619 (O)

MBE OMBUDSMAN UNIT



PRESENTED BY

NICHELLE JOHNSON

MBE Ombudsman Unit – Our Role

www.gomdsmallbiz.maryland.gov

Ombudsman Unit Duties include:

- Conducting training for state agency personnel on enforcement of the requirements of current MBE laws and regulations
- Conducting training for prime contractors as well as MBEs performing in the prime and/or subcontracting role
- Serve as a resource to minority business enterprise liaisons, procurement officers in units of State government, and others.
- Work with prime contractors, MBEs, and state agencies to resolve issues that arise during contract performance
- Developing policies and guidance to assist agencies in implementing the MBE Program

MBE Ombudsman Unit – Our Role Ombudsman Unit Duties include:

The MBE Ombudsman Unit – Our Staff

MBE LIAISON COMAR 21.11.03.05

Ombudsman Unit – Our Staff





Shanique Pinder **Catherine Porterfield**

MBE Ombudsman Compliance Managers

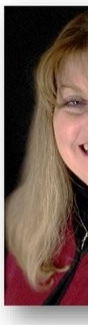
Nichelle Johnson
MBE Ombudsman

www.gomdsmallbiz.maryland.gov

The MBE Ombudsman Unit – Our Staff







Tracie Bolden **Shanique Pinder** **Catheri**

MBE Ombudsman Compliance Managers



Nichelle Johnson
MBE Ombudsman

www.gomdsmallbiz.maryland.gov

The MBE Om



Tracie Bolden

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MBE

Tracie Bolden

Shanique Pinder

Catherine Porterfield

MBE Ombudsman Compliance Managers

Nichelle Johnson MBE Ombudsman

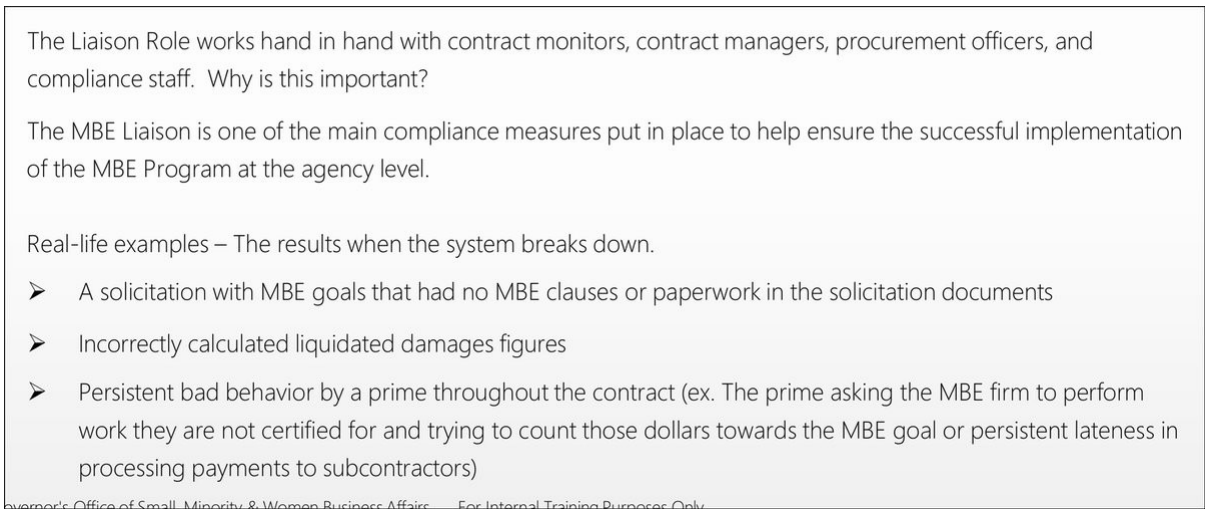
www.gomdsmallbiz.maryland.gov

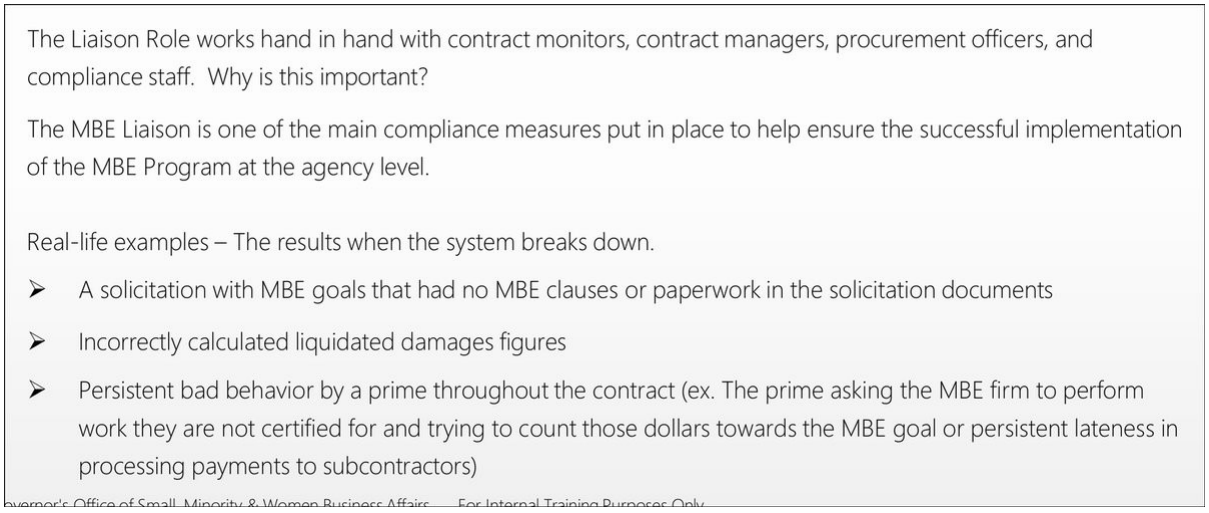
MBE PROGRAM COMPLIANCE

- As a part of the compliance process for the MBE program, you are to monitor, facilitate, promote, and ensure compliance with MBE Program Laws, Regulations, Guidelines, Policies, and Objectives at both the state and agency levels.
- You should be both effective and just in advocating for the proper treatment of Small, Minority & Women business owners. Specifically, to State certified MBE businesses.
- This includes a commitment to identifying and acting on both compliance lapses and fraud.

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The Liaison Role works hand in hand with contract monitors, contract managers, procurement officers, and compliance staff. Why is this important?

The MBE Liaison is one of the main compliance measures put in place to help ensure the successful implementation of the MBE Program at the agency level.

Real-life examples – The results when the system breaks down.

A solicitation with MBE goals that had no MBE clauses or paperwork in the solicitation documents

Incorrectly calculated liquidated damages figures

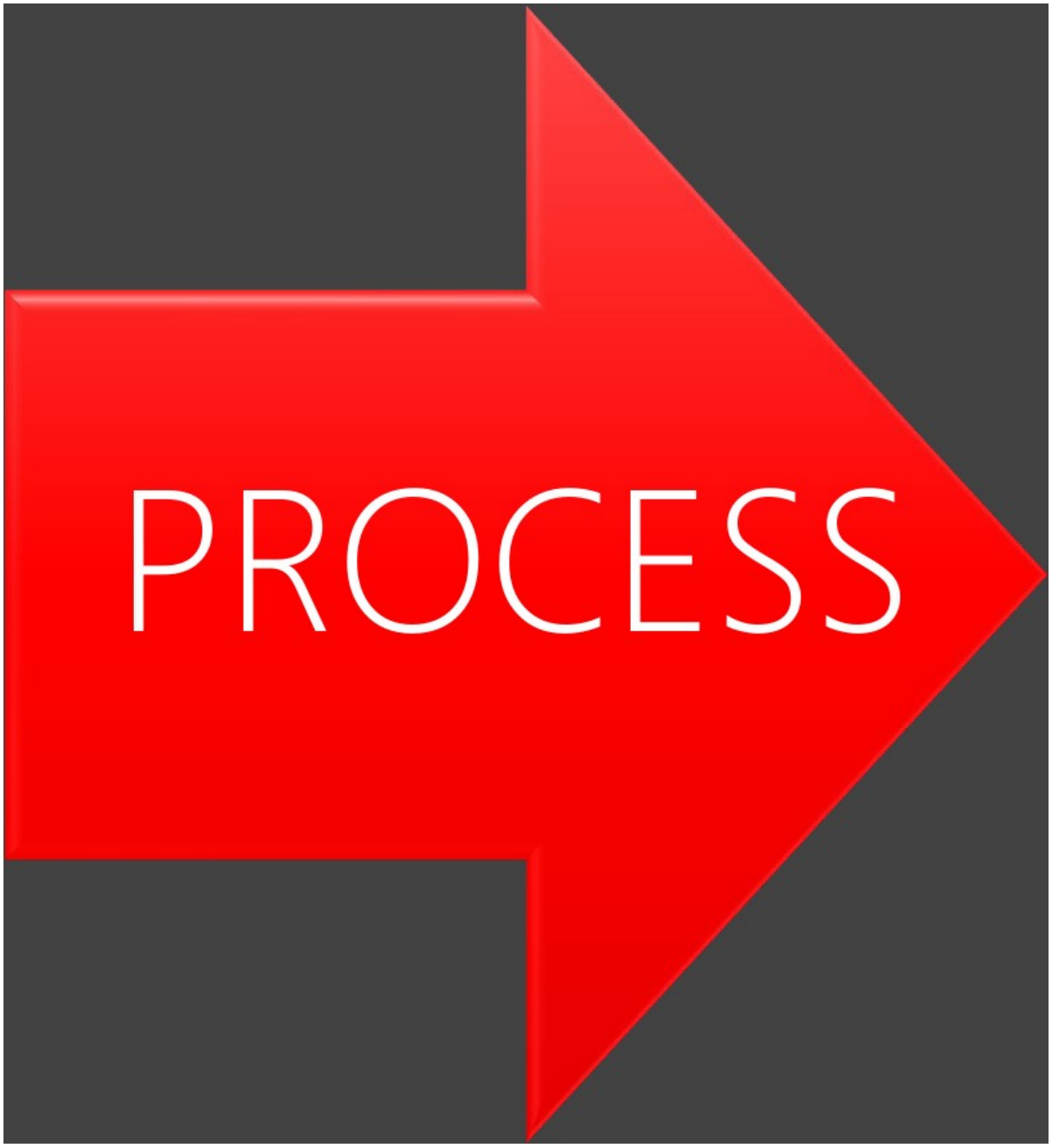
Persistent bad behavior by a prime throughout the contract (ex. The prime asking the MBE firm to perform work they are not certified for and trying to count those dollars towards the MBE goal or persistent lateness in processing payments to subcontractors)

PROGRAM IMPLEMENTATION & COMPLIANCE

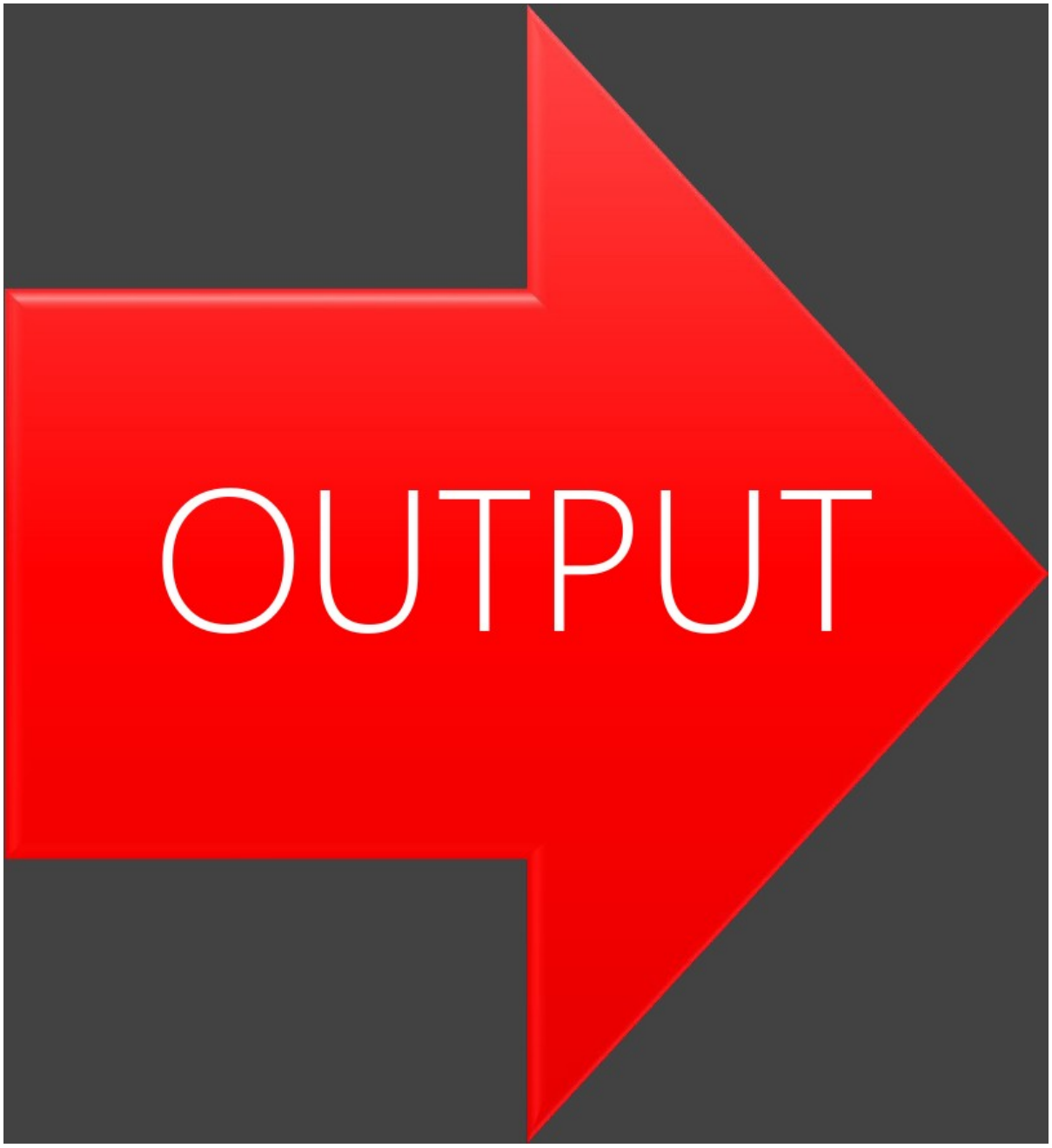
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INPUT

7

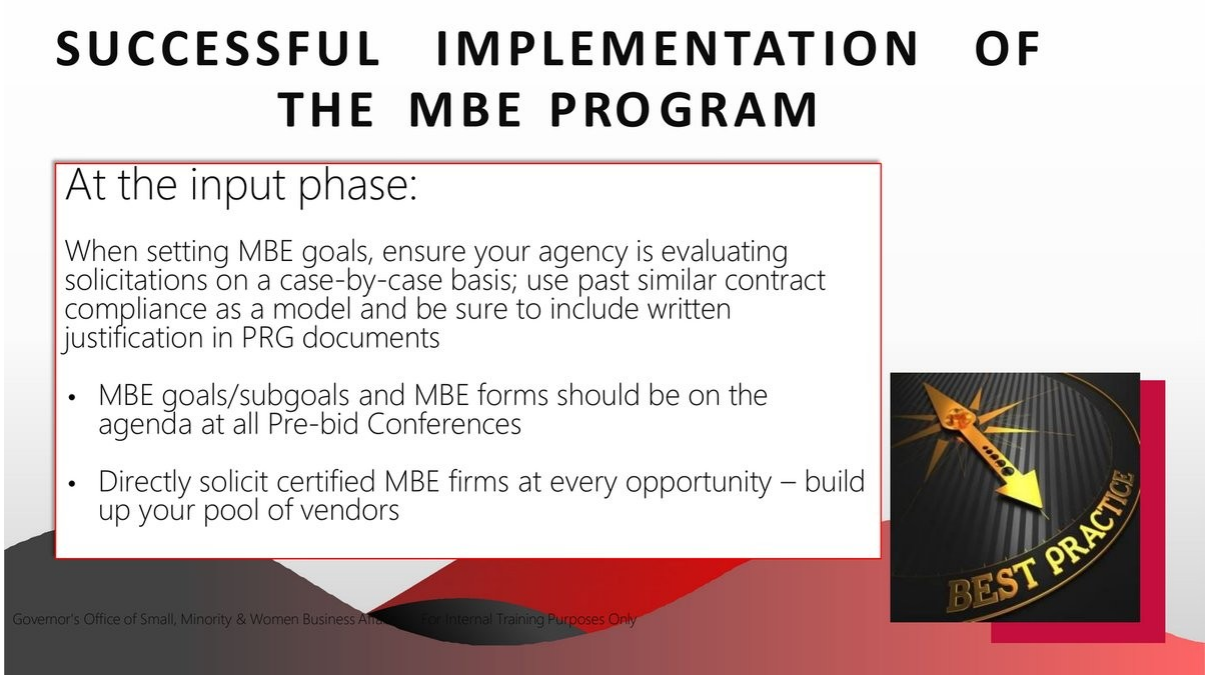


PROCESS



OUTPUT

SUCCESSFUL IMPLEMENTATION OF THE MBE PROGRAM



There should be at least one or more standing procurement review group(s) within your unit. The PRG shall be comprised of:

Agency's chief procurement official or senior-level procurement official designated to act in his/her place
SBR, MBE & VSBE Liaison Officers or designees
Your unit's legal counsel to provide support and advice, as necessary

If the procurement be broken down into subcontracting opportunities
Does the contract structure support subcontracting?
Did the unit list all possible subcontracting UNSPSC/NAICS Codes on the PRG Form
Are small, minority, women, and veteran-owned businesses available in the identified categories?
Does it make sense geographically?
Consider the 60% Rule's impact on MBE goal setting and goal achievement
Treat the MBE & VSBE Programs as mutually exclusive
Dually-certified firms can count toward both program goals)
Provide as much detail and context as possible on your PRG Determination (for historical purposes and protest)

Thorough evaluation of procurements expected to exceed $100,000 in value for MBE and VSBE participation, including evaluation for MBE Subgoals as directed in the MBE Program Subgoal Guidance •

Resource: BPW Advisory 2001-1

PRG Guidance and Worksheets are on OSP's website: https://procurement.maryland.gov/procurement-review-group-prg/

At the input phase:

When setting MBE goals, ensure your agency is evaluating solicitations on a case-by-case basis; use past similar contract compliance as a model and be sure to include written justification in PRG documents

- MBE goals/subgoals and MBE forms should be on the agenda at all Pre-bid Conferences
- Directly solicit certified MBE firms at every opportunity – build up your pool of vendors

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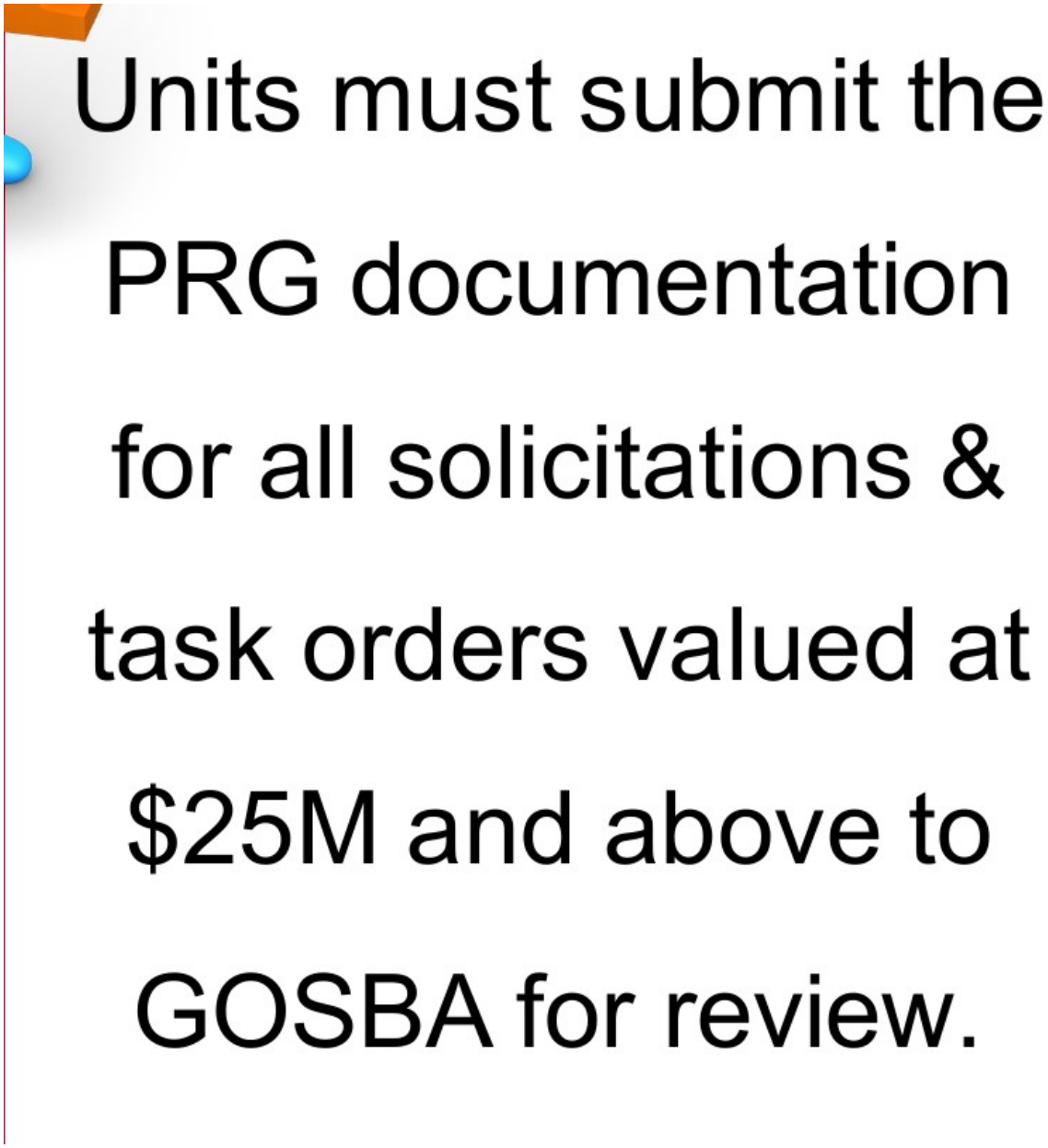
PROCUREMENT REVIEW GROUP (PRG)

P RG (C O N T.)

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Units must submit the PRG documentation for all solicitations & task orders valued at $25M and above to GOSBA for review.



Units must submit the PRG documentation for all solicitations & task orders valued at

$25M and above to GOSBA for review.

Best practices:
Documents should be completely filled out & signed
Units should include a clear and adequate justification for goals, especially 0% goals.
Provide all relevant documentation including PRG Forms, Research with SBR/MBE/VSBE firms identified, Engineers' Estimate, SOW

ARE SUBGOALS APPLIED CORRECTLY?

Your agency must fill out the subgoal worksheet and determine if Subgoals will be set on procurements Any relevant Subgroup with less than 3 certified firms available results in no subgoal being set for that subgroup Ex.: Construction Contract with an overall MBE goal of 25% would be evaluated for Subgoals. If your search reveals that 2 African American MBE firms and 10 Women owned MBE firms were available, this will result in only a Women Subgoal of 11%

TABLE 2 – RECOMMENDED SUBGOALS								
Combined Industry Category (Check appropriate column per Step 5.)			**Cons** ☐	**AE-CRS** ☐	**Main** ☐	**IT** ☐	**Serv** ☐	**CSE** ☐
9. # of Firms	**10. ≥ 3 Y/N**	**Subgroups**						
		African American	8%	7%	9%	10%	—	6%
		Hispanic American	—	—	3%	—	2%	2%
		Asian American	—	—	2%	—	3%	—
		Women	11%	10%	—	10%	10%	8%
Subgoal Total			19%	17%	14%	20%	15%	16%
Subgoal Total Plus 2% Margin			**21%**	**19%**	**16%**	**22%**	**17%**	**18%**
***The *Subgoal Total Plus 2% Margin* is the sum of the Recommended Subgoals plus 2%.**								
☑ **Refer to Table 2 above. If there are 3 or more certified firms in a Subgroup for the work of the procurement (indicated by a "Y" in Column 10), the Recommended Subgoal for the Combined Industry Category in Table 2 should be set for that Subgroup unless an explanation is provided in Step 11.** ☑ **A subgoal may not be set if the number of certified firms in that Subgroup is less than 3 (indicated by an "N" in Column 10).**								
11. The following Recommended Subgoals have not been set because:								

Any relevant Subgroup with less than 3 certified firms available results in no subgoal being set for that subgroup

COMPLIANCE REGULATIONS - PROCESS

Governor's Office of Small, Minority & Women Business Affairs

For Internal Training Purposes Only



COMAR 21.11.03.13 – General Compliance Requirements

COMAR 21.11.03.10 – Contract Award Compliance Requirements including Good Faith Efforts considerations for Waiver Requests and Contract provisions, such as Liquidated Damages.

COMAR 21.07.01.14 – Mandatory Liquidated Damages provisions for all contracts with certified MBE participation goals and any other contracts deemed appropriate by PO in consultation with that AAG.

PROGRAM IMPLEMENTATION AND COMPLIANCE

Know the rules; Make sure your Agency follows the rules
Reviewing legislation and resulting policy changes
Attending training
Contract Award reviews

• Assist MBE contractors with issues that arise during contract performance (should go through contract monitor/manager
• Attend Corrective Action Meetings

Review agency contracting
Ensuring that solicitation documentation
Answering internal agency questions to

procedures to ensure compliance

includes the necessary forms, clauses, and language for each program

ensure current contracts are upholding socioeconomic policies

Reviewing MBE forms & waiver requests (Good Faith Efforts Documentation)

MBE PROGRAM COMPLIANCE

guidance is needed.

Sample Forms are provided on our website, as well as a Forms training in the MBE toolkit: https://gomdsmallbiz.maryland.gov/Pages/Reporting-Tool-MBE.aspx

COMAR 21.11.03.09 - 10 and 21.11.03.11

Review MBE forms for accuracy and completeness, especially Waiver paperwork.

MBE Participation Forms

• Thoroughly review MBE forms to ensure they are correct and complete, including the application of the

60% rule (COMAR 21.11.03.12-1).

D-1A - MBE Utilization and Fair Solicitation Affidavit and MBE Participation Schedule D-3A - MBE Subcontractor Project Participation Certification Along with this document, you would also be requesting copies of MBE subcontract agreements per COMAR 21.11.03.10 D-3B - MBE Prime Contractor Participation Certification

Procurement staff are directed to contact the agency MBE Liaison if there are issues or if additional

Waiver Documentation

Carefully review any waiver documentation to make sure it fits the “good faith efforts” requirement.
D-1B - Exhibit A: MBE Subcontractor Unavailability Certificate
D-1C - Good Faith Efforts Documentation (as defined in COMAR 21.11.03.11)
D-2 - MBE Outreach Efforts Compliance Statements
Procurement Officers should follow the guidance and best practices found in the

MBE & VSBE Goal Waiver Guidance: Good Faith Efforts Review & Documentation

MBE PROGRAM COMPLIANCE

Contract Compliance should be reviewed by the contract monitor or other assigned staff using the MBE reports (Attachment D) regularly received from Primes/Subcontractors
D-4A - Prime Contractor Paid/Unpaid Invoice Report
D-4B - MBE Prime Contractor Report
D-5 - MBE Subcontractor Paid/Unpaid Invoice Report
Payment Issues should be handled promptly per Prompt Payment Guidelines
Agency contract compliance reports should be regularly generated by liaisons, contract monitors,

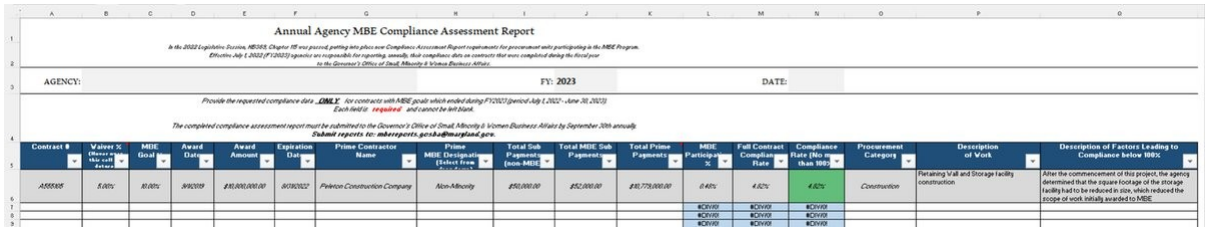
or other assigned staff that utilize this data.

This data is essential when performing contract close-out.

MBE COMPLIANCE - OUTPUT

Governor's Office of Small, Minority & Women Business Affairs

For Internal Training Purposes Only



Annual Agency MBE Compliance Assessment Report

AGENCY: FY: 2023 DATE:

Contract #	Waiver X (Hover over this cell for dataset explanation)	MBE Goal	Award Date	Award Amount	Expiration Date	Prime Contractor Name	Prime MBE Designation (Select from dropdown)	Total Sub Payments [non-MBE]	Total MBE Sub Payments	Total Prime Payments	MBE Participation %	Full Contract Compliance Rate	Compliance Rate (No more than 100%)	Procurement Category	Description of Work	Description of Factors Leading to Compliance below 100%
A555105	5.00%	10.00%	9/9/2019	$10,000,000.00	8/30/2022	Peirron Construction Company	Non-Minority	$50,000.00	$52,000.00	$10,779,000.00	0.48%	4.82%	4.82%	Construction	Retaining Wall and Storage facility construction	After the commencement of this project, the agency determined that the square footage of the storage facility had to be reduced in size, which reduced the scope of work initially awarded to MBE.
											#DIV/0!	#DIV/0!	#DIV/0!			
											#DIV/0!	#DIV/0!	#DIV/0!			
											#DIV/0!	#DIV/0!	#DIV/0!			

Contract Number (Hover over this cell for dataset explanation)	Award Date	Award Amount	Expiration Date	Subcontractor Name	MBE Designation (Select from dropdown)	Total Subcontractor Payments	Description of Work (Relevant to this subcontractor only)
A555105	9/1/2019	$10,500.00	8/31/2022	Applied Brick and Mortar	African American	$7,500.00	Retaining wall, masonry (i.e., block, brick, stone), construction

- The Compliance Assessment Report data will be used by the Ombudsman unit to track and monitor contracts that did not meet the established MBE goal. Contracts that do not meet the MBE goal are required to list valid mitigating factors.

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Presenter Notes 2025-02-18 17:51:48 ----------As a reminder – the MBE Quarterly Compliance Check-in should be submitted each quarter. In quarter 2 only 28 agencies (39%) submitted their check-in.

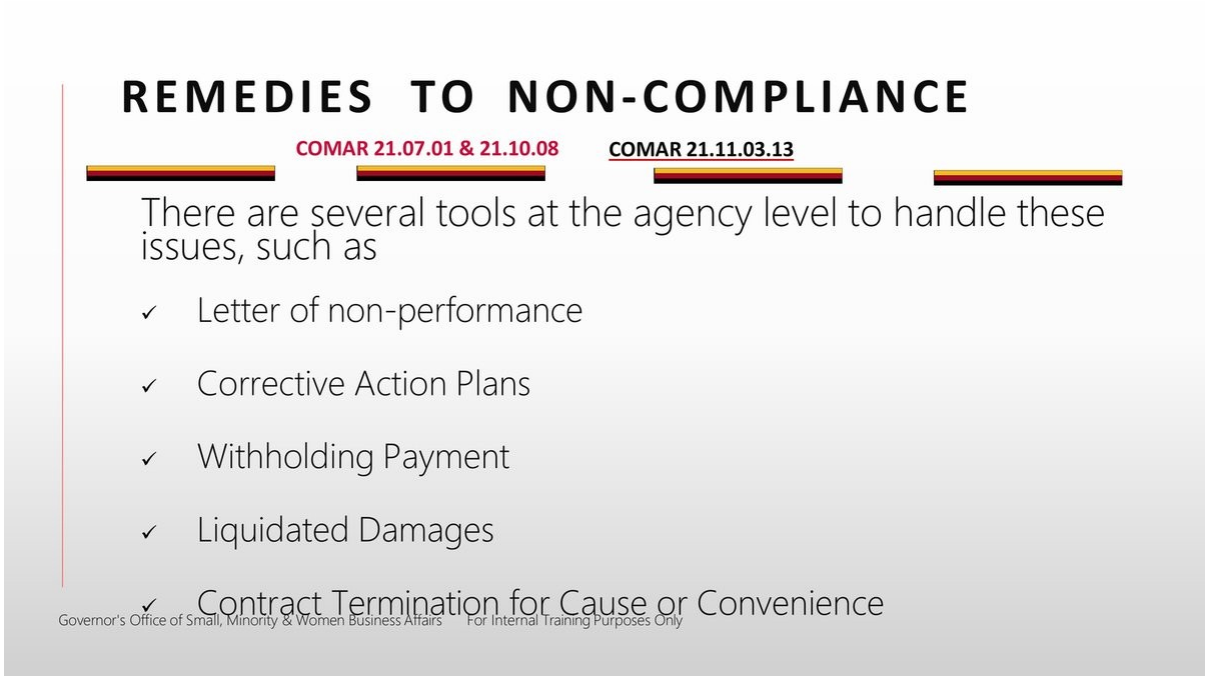
MBE PROGRAM COMPLIANCE

Governor's Office of Small, Minority & Women Business Affairs For Internal Training Purposes Only

Procurement staff should collaborate with the Prime, the MBE liaison, and legal counsel to quickly resolve issues with MBE subcontractors.

Only after these steps should procurement staff or subcontractors reach out to the MBE Ombudsman Unit for assistance.

Procurement staff, compliance staff, and the MBE liaison should ensure that issues are handled in accordance with COMAR, procurement guidelines, and best practices



Your main resources will be:

Office of State Procurement Website

Latest Forms (PRG, Attachment D- NEW forms coming)

Procurement Manual including Policies, Procedures, and Best Practices

GOSBA MBE Toolkit

Guidance (Liquidated Damages, Subgoals, Reporting, Sample Forms, Training Materials)

MBE Ombudsman Page – State Agency Resources

MDOT Directory

State Certified MBE Vendors

BPW Website

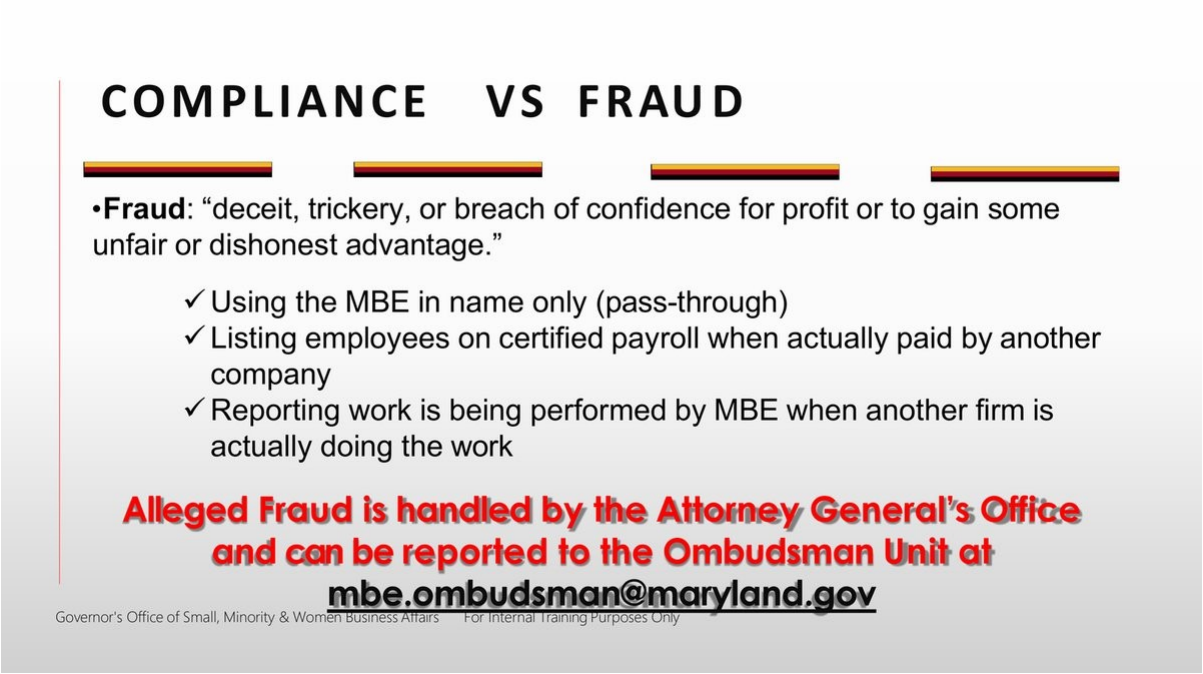
Advisories - 2001-1 (PRG Guidance), 2003-2 (Waivers Report)

There are several tools at the agency level to handle these

REMEDIES TO NON-COMPLIANCE

COMAR 21.07.01 & 21.10.08 COMAR 21.11.03.13

COMPLIANCE VS FRAUD



Fraud: "deceit, trickery, or breach of confidence for profit or to gain some unfair or dishonest advantage."

Using the MBE in name only (pass-through)

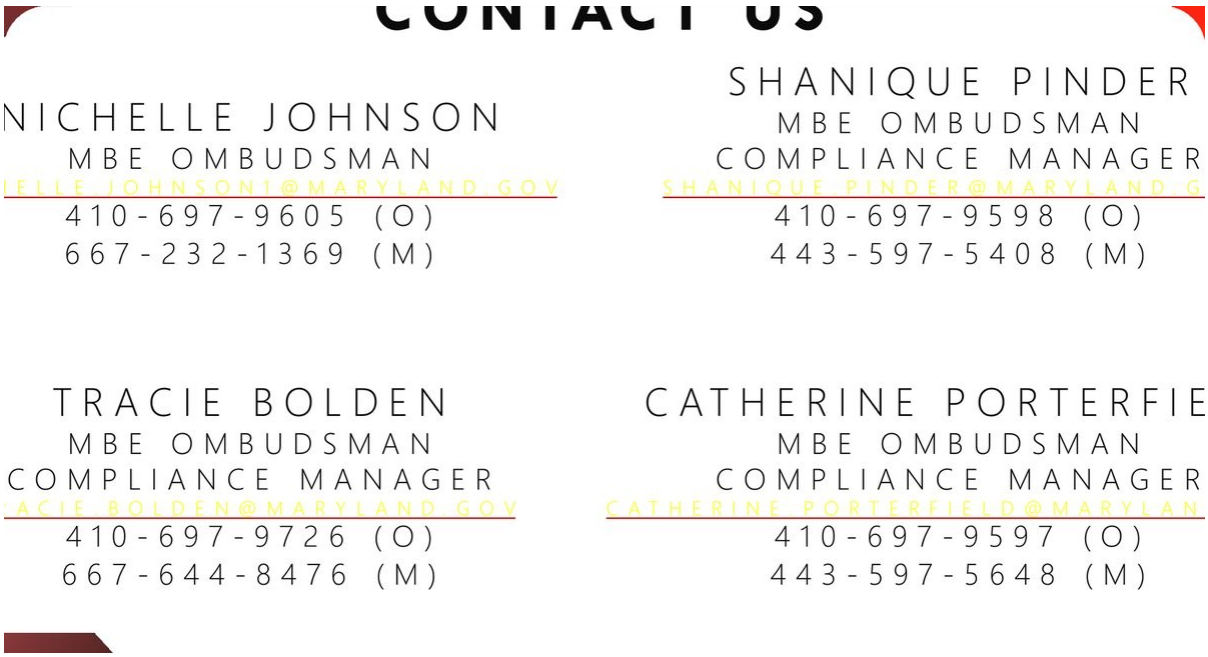
Listing employees on certified payroll when actually paid by another company

Reporting work is being performed by MBE when another firm is actually doing the work

Alleged Fraud is handled by the Attorney General's Office and can be reported to the Ombudsman Unit at mbe.ombudsman@maryland.gov

RESOURCES

C O N TAC T U S



NICHELLE JOHNSON

MBE OMBUDSMAN

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443-597-5648 (M)

MBE Program updates Presented by Karen Reyes MBE compliance Manager

NEW Addition to the GOSBA team!

Tiara Randolph joined GOSBA at the end of December as an MBE Compliance Manager. Tiara has jumped right in and some of you may have already noticed her in the compliance call and one-on-one agency meetings. Tiara brings a wealth of experience from the Office of Minority Business Enterprise where she assisted MBE businesses through the certification process. Tiara is innovative and dedicated to the MBE community.



Tiara's Designated Agencies:		
STATE AGENCIES:	MDOT:	UNIVERSITIES:
AGING	MOTOR VEHICLE ADMINISTRATION	BOWIE STATE UNIVERSITY
ARCHIVES	TRANSIT ADMINISTRATION	COPPIN STATE UNIVERSITY
COMMERCE	TRANSPORTATION AUTHORITY	FROSTBURG STATE UNIVERSITY
COMMISSION ON CIVIL RIGHTS		SALISBURY UNIVERSITY
COMPTROLLER		U OF MD, COLLEGE PARK
EMERGENCY MANAGEMENT		U OF MD, GLOBAL CAMPUS
EXECUTIVE DEPARTMENT		UNIVERSITY OF BALTIMORE
GOV-CRIME CONTROL & PREVENTION		
HEALTH BENEFIT EXCHANGE		
HIGHER EDUCATION COMMISSION		
HOUSING & COMMUNITY DEVELOPMENT		
INSURANCE ADMINISTRATION		
JUVENILE SERVICES		

Tiara's Designated Agencies:		
LOTTERY & GAMING CONTROL		
MILITARY DEPARTMENT		
PLANNING		
PUBLIC DEFENDER		
PUBLIC SAFETY & CORRECTIONAL SERVICES		
PUBLIC WORKS		
SCHOOL FOR THE DEAF		
STATE PROSECUTOR		
STATE RETIREMENT AGENCY		
SUBSEQUENT INJURY FUND		
VETERANS AFFAIRS		
WORKER'S COMPENSATION COMMISSION		

Tiara’s Designated Agencies are listed on the left-hand side, any MBE Liaisons who need assistance feel free to email or schedule a one-on-one on Tiara’s Calendly Link here:

Calendly -Tiara Randolph -GOSBA-

Karen's Designated Agencies:		
STATE AGENCIES:	MDOT:	UNIVERSITIES:
AGRICULTURE	AVIATION ADMINISTRATION	BALTIMORE CITY COMMUNITY COLLEGE
ASSESSMENTS & TAXATION	PORT ADMINISTRATION	MORGAN STATE UNIVERSITY
ATTORNEY GENERAL	STATE HIGHWAY ADMINISTRATION	SAINT MARY'S COLLEGE OF MARYLAND
BUDGET & MANAGEMENT	TRANSPORTATION (TSO)	TOWSON UNIVERSITY
CANAL PLACE PRESERVATION		U OF MD, BALTIMORE
EDUCATION		U OF MD, BALTIMORE COUNTY
ENVIRONMENT		U OF MD, EASTERN SHORE
ENVIRONMENTAL SERVICES		
FOOD CENTER AUTHORITY		
GENERAL SERVICES		
HEALTH		
HUMAN SERVICES		
INFORMATION TECHNOLOGY		
LABOR		
MARYLAND STATE LIBRARY		
NATURAL RESOURCES		
PEOPLE'S COUNSEL		
PUBLIC BROADCASTING COMMISSION		
PUBLIC SERVICE COMMISSION		
STADIUM AUTHORITY		
STATE BOARD OF ELECTIONS		
STATE POLICE		

Karen's Designated Agencies:		
SUPPLEMENTAL RETIREMENT		
TAX COURT		
TREASURER		

Karen’s Designated Agencies are listed on the left-hand side, any MBE Liaisons who need assistance feel free to email or schedule a one-on-one on Karen’s Calendly Link here:

AGRICULTURE ASSESSMENTS & TAXATION

BUDGET & MANAGEMENT CANAL PLACE PRESERVATION EDUCATION

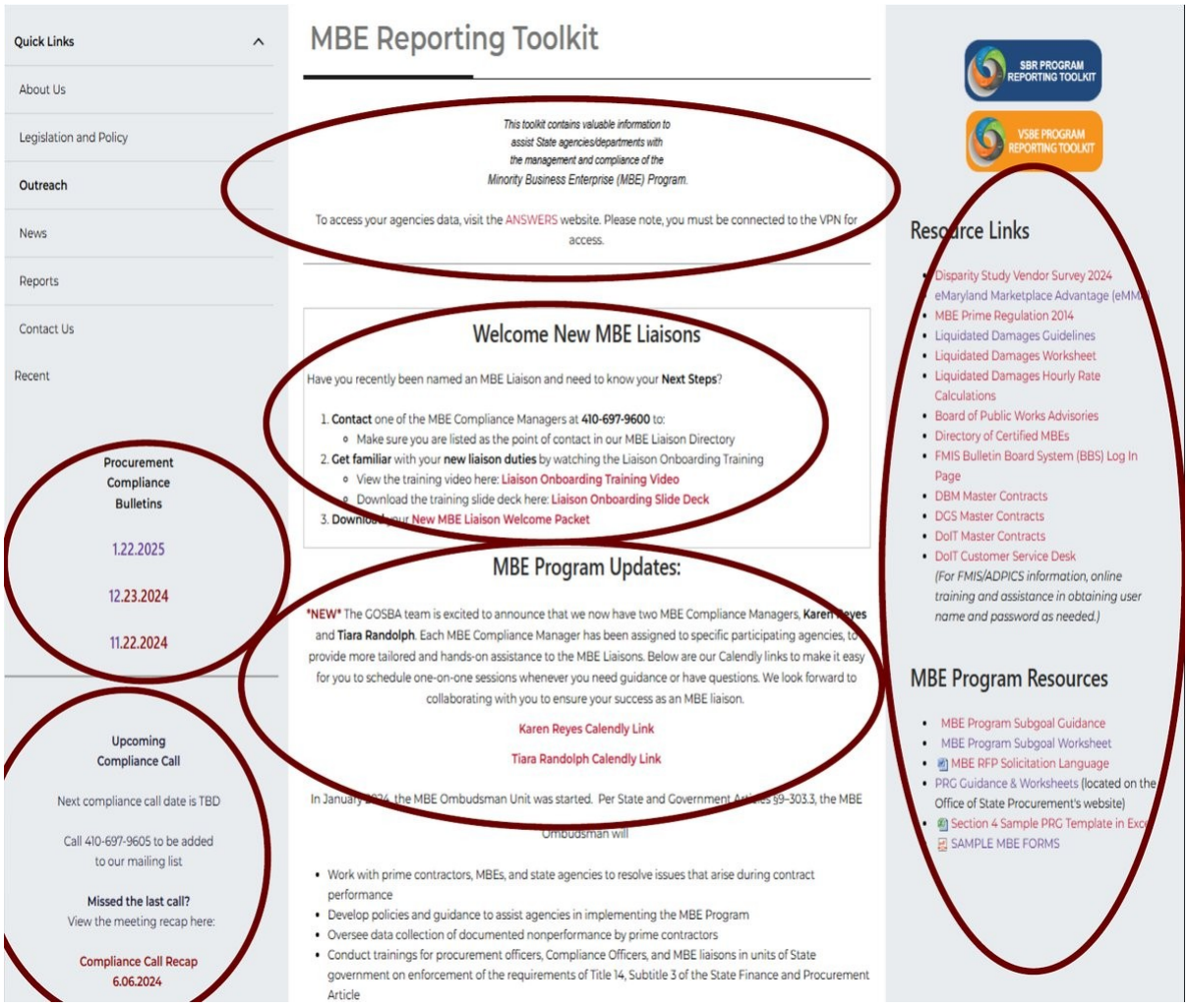
ENVIRONMENT ENVIRONMENTAL SERVICES FOOD CENTER AUTHORITY GENERAL SERVICES HEALTH HUMAN SERVICES INFORMATION TECHNOLOGY LABOR MARYLAND STATE LIBRARY NATURAL RESOURCES PEOPLE'S COUNSEL PUBLIC BROADCASTING COMMISSION PUBLIC SERVICE COMMISSION STADIUM AUTHORITY STATE BOARD OF ELECTIONS STATE POLICE SUPPLEMENTAL RETIREMENT TAX COURT TREASURER

U OF MD, BALTIMORE U OF MD, BALTIMORE COUNTY U OF MD, EASTERN SHORE

Calendly -Karen Reyes -GOSBA-

MBE REPORTING TOOLIKIT UPDATEs

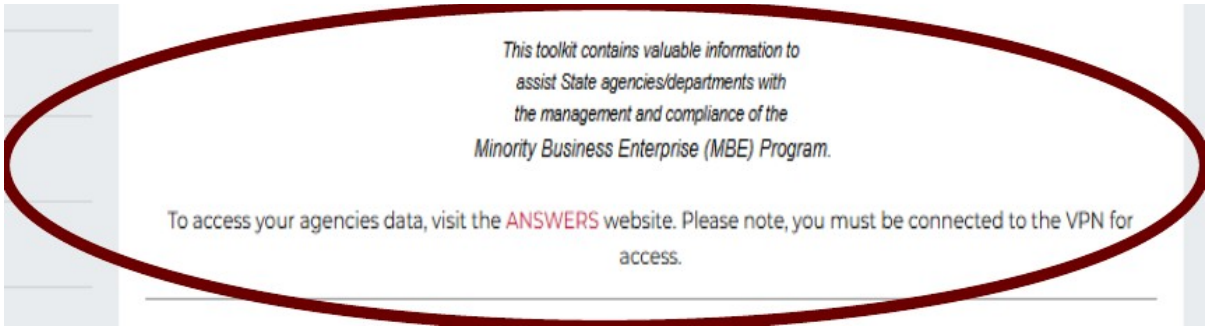
New look to the Toolkit!



Dedicated sections in the toolkit:

- ANSWERS website link
- Welcome new MBE Liaisons resources
- MBE Program Updates

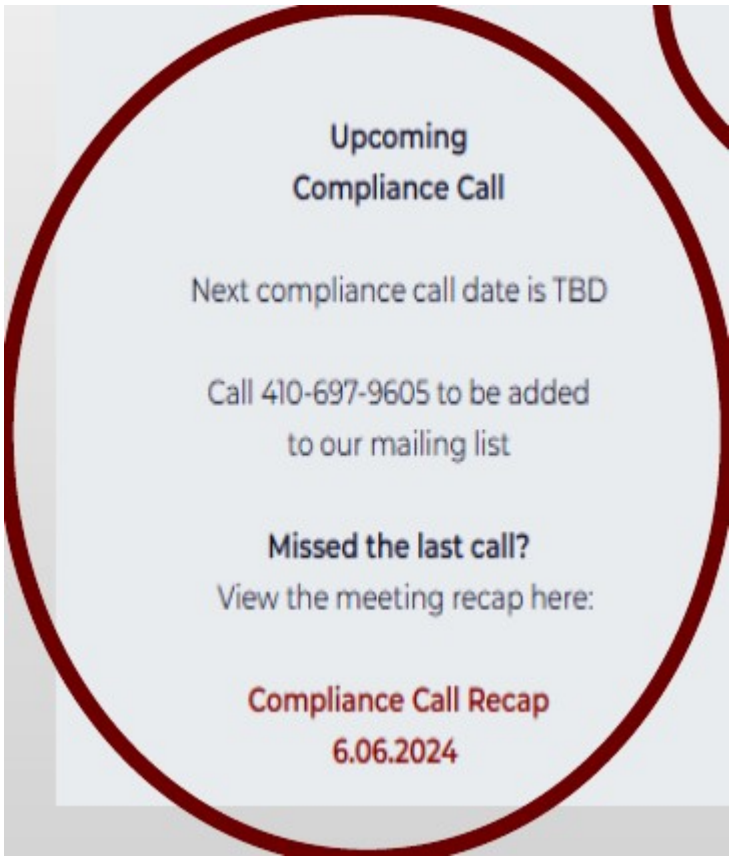
Calendly Links to Schedule one-on-one sessions
Procurement compliance Bulletins
Compliance Calls
Program resource links








Procurement
Compliance
Bulletins
1.22.2025
12.23.2024
11.22.2024


Upcoming
Compliance Call
Next compliance call date is TBD
Call 410-697-9605 to be added
to our mailing list
Missed the last call?
View the meeting recap here:
Compliance Call Recap
6.06.2024

Resource Links

- Disparity Study Vendor Survey 2024
- eMaryland Marketplace Advantage (eMM
- MBE Prime Regulation 2014
- Liquidated Damages Guidelines
- Liquidated Damages Worksheet
- Liquidated Damages Hourly Rate Calculations
- Board of Public Works Advisories
- Directory of Certified MBEs
- FMIS Bulletin Board System (BBS) Log In Page
- DBM Master Contracts
- DGS Master Contracts
- DoIT Master Contracts
- DoIT Customer Service Desk
  (For FMIS/ADPICS information, online training and assistance in obtaining user name and password as needed.)

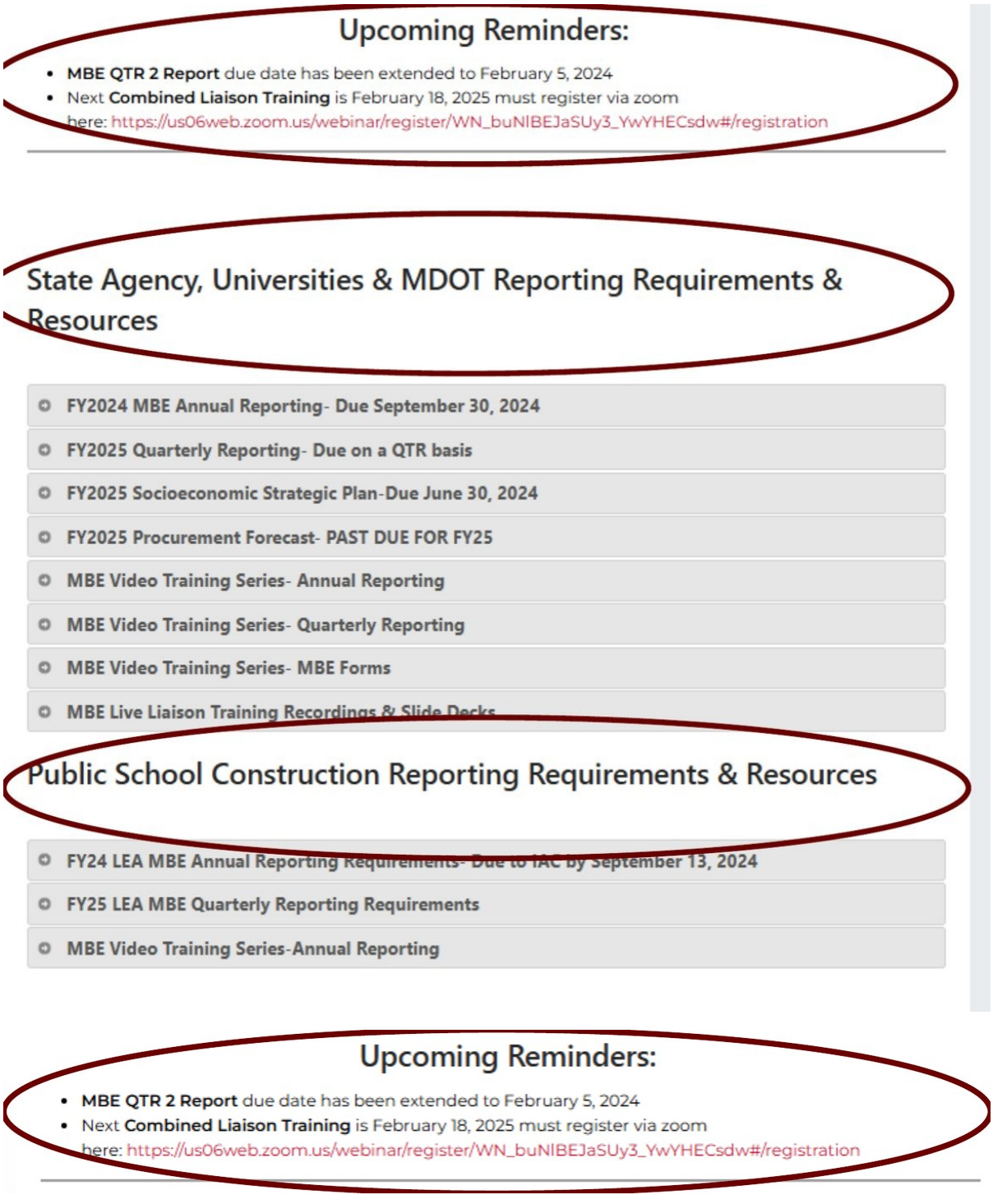
MBE Program Resources

- MBE Program Subgoal Guidance
- MBE Program Subgoal Worksheet
- MBE RFP Solicitation Language
- PRG Guidance & Worksheets (located on the Office of State Procurement's website)
- Section 4 Sample PRG Template in Exc
- SAMPLE MBE FORMS

New look to the Toolkit!(cont.)

Dedicated sections in the toolkit:

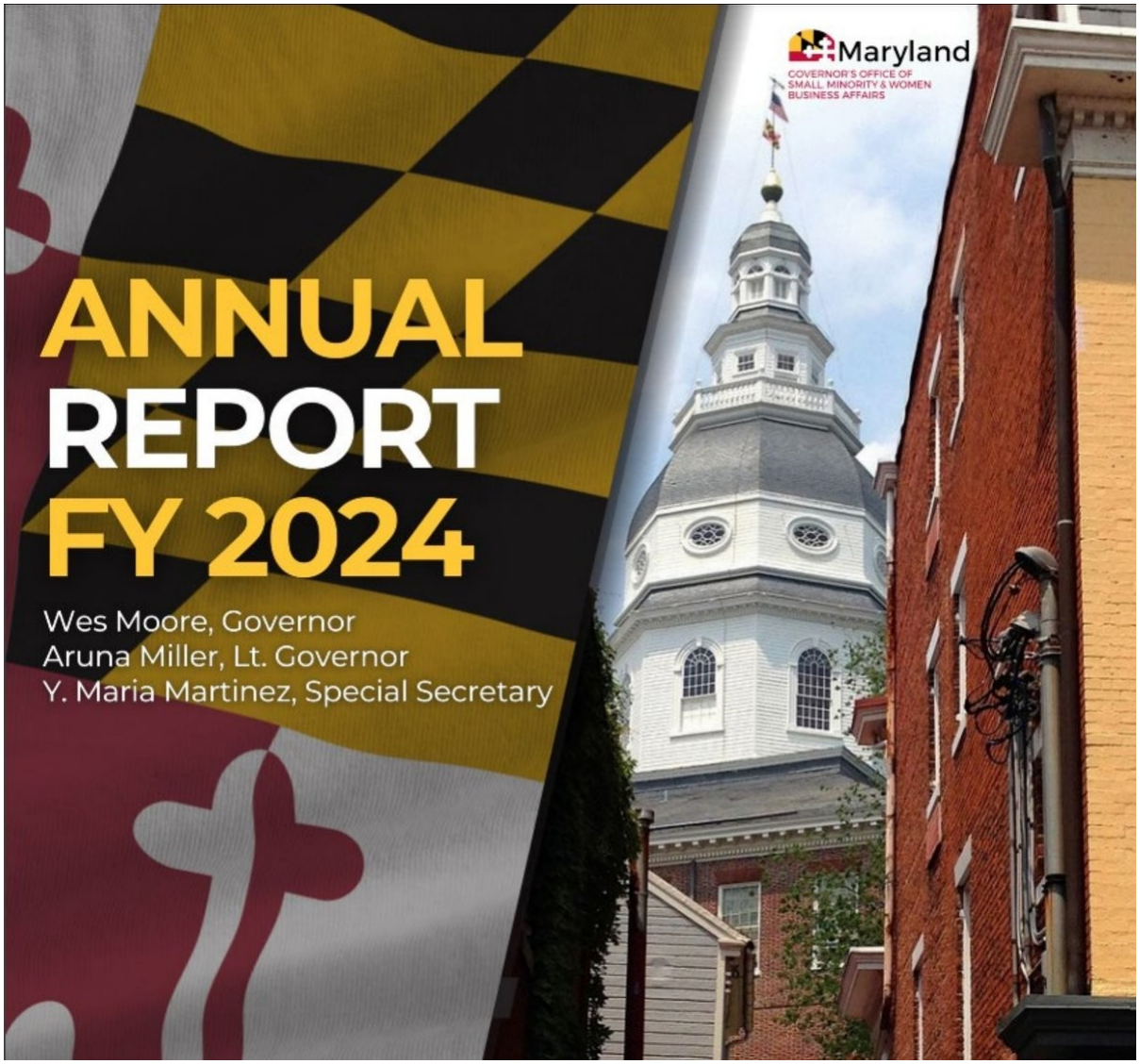
- Upcoming Reminders & Deadlines
- Dedicated drop-down menus for State Agencies, Universities, MDOT & Public-School Construction Reporting Requirements
- Drop-down menus are broken down by:
  - Annual reporting
  - Quarterly reporting
  - Strategic Plans
  - Procurement Forecast
  - Video Training Series



State Agency, Universities & MDOT Reporting Requirements & Resources

Public School Construction Reporting Requirements & Resources

FISCAL YEAR 2024 ANNUAL REPORT



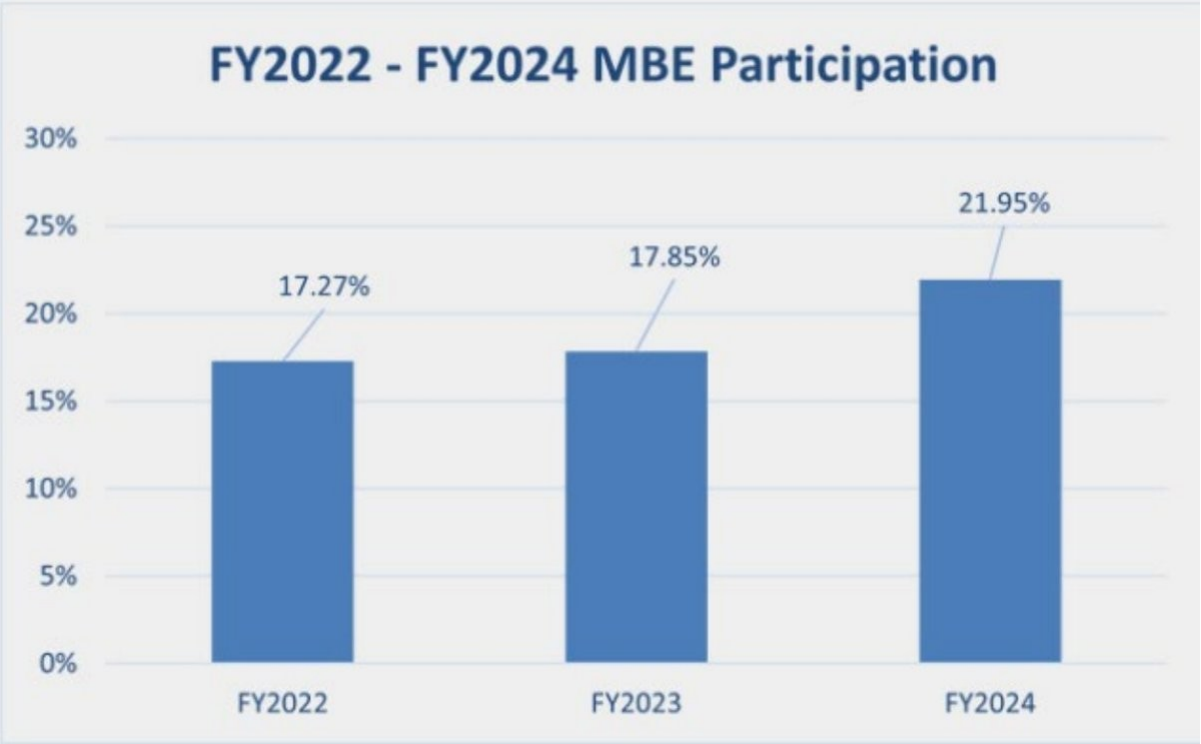
MBE Annual report Findings

The overall progression of the MBE goal attainment has increased by 23%!!

MBE Program performance is measured by dollars awarded to MBE certified firms

Statewide spending among MBE participating units increased 50%

Similarly, total dollars awarded to MBEs increased significantly by 85% in FY2024

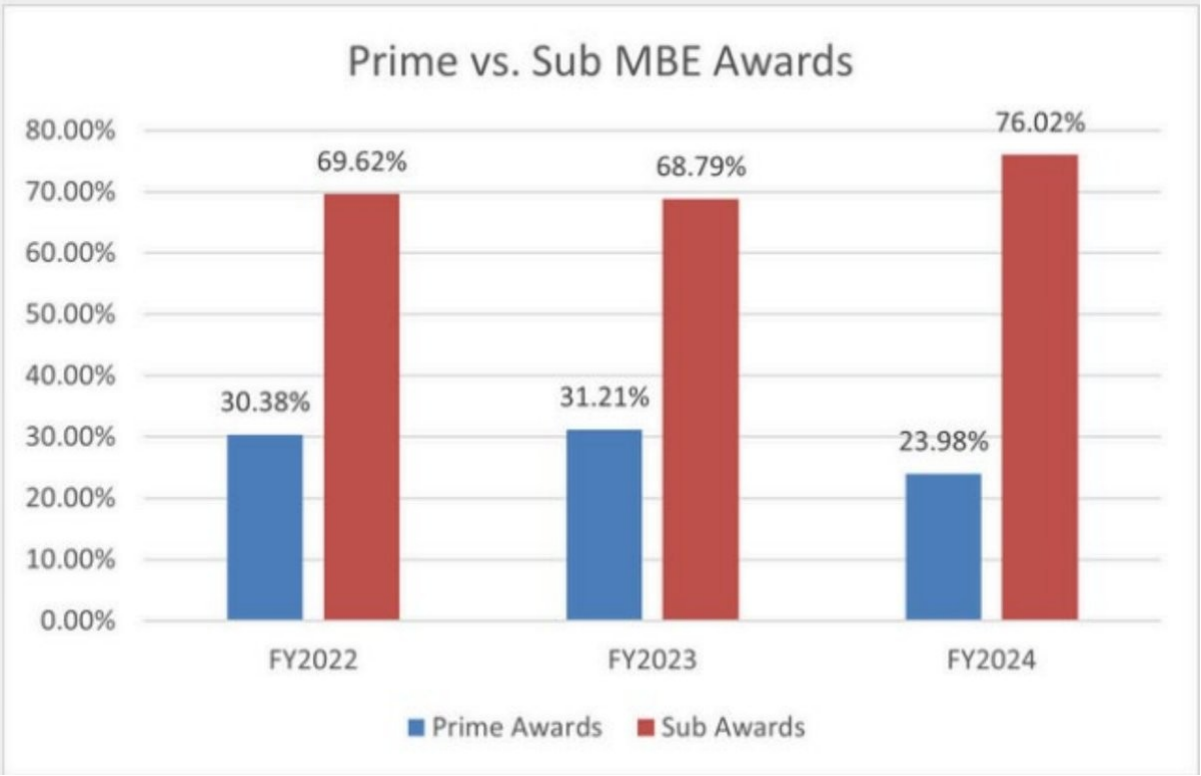


PRIME VS. SUB Awards

Total MBE awards represent dollars awarded to certified MBEs operating as both prime contractors and subcontractors.

- 76% was awarded to MBE subcontractors
- 24% was awarded to MBE prime contractors

This is significant as the utilization of more Minority Business Enterprise (MBE) subcontractors increases when contracts include MBE l



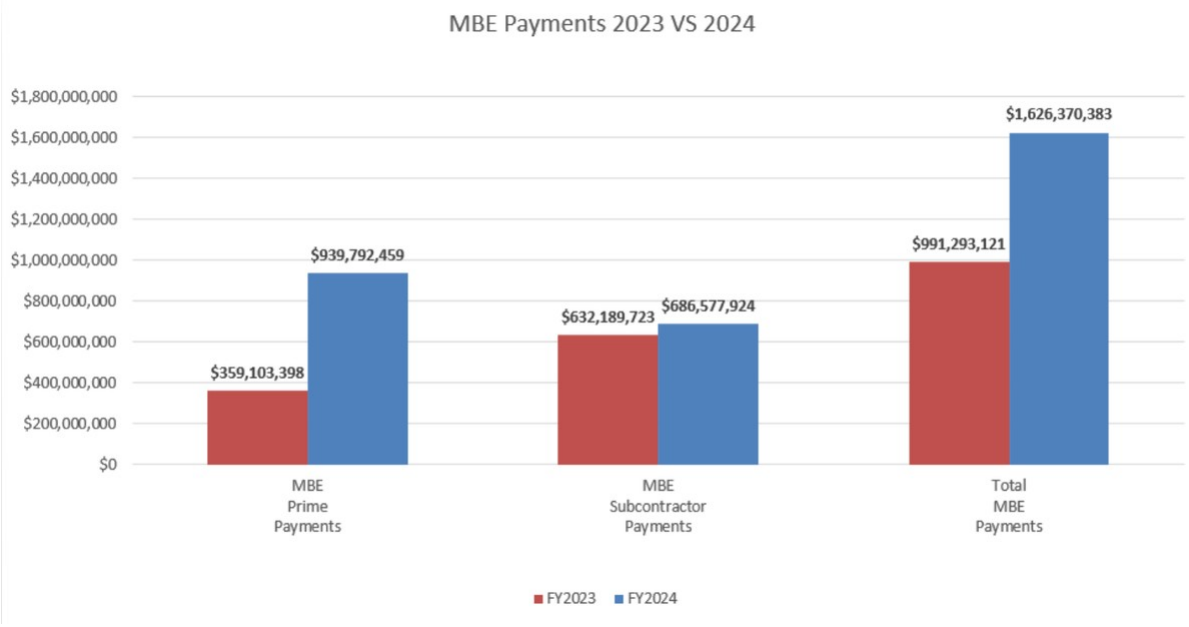
MBE Annual report Payments Highlight

Overall, payments to MBE firms increased by 64%,

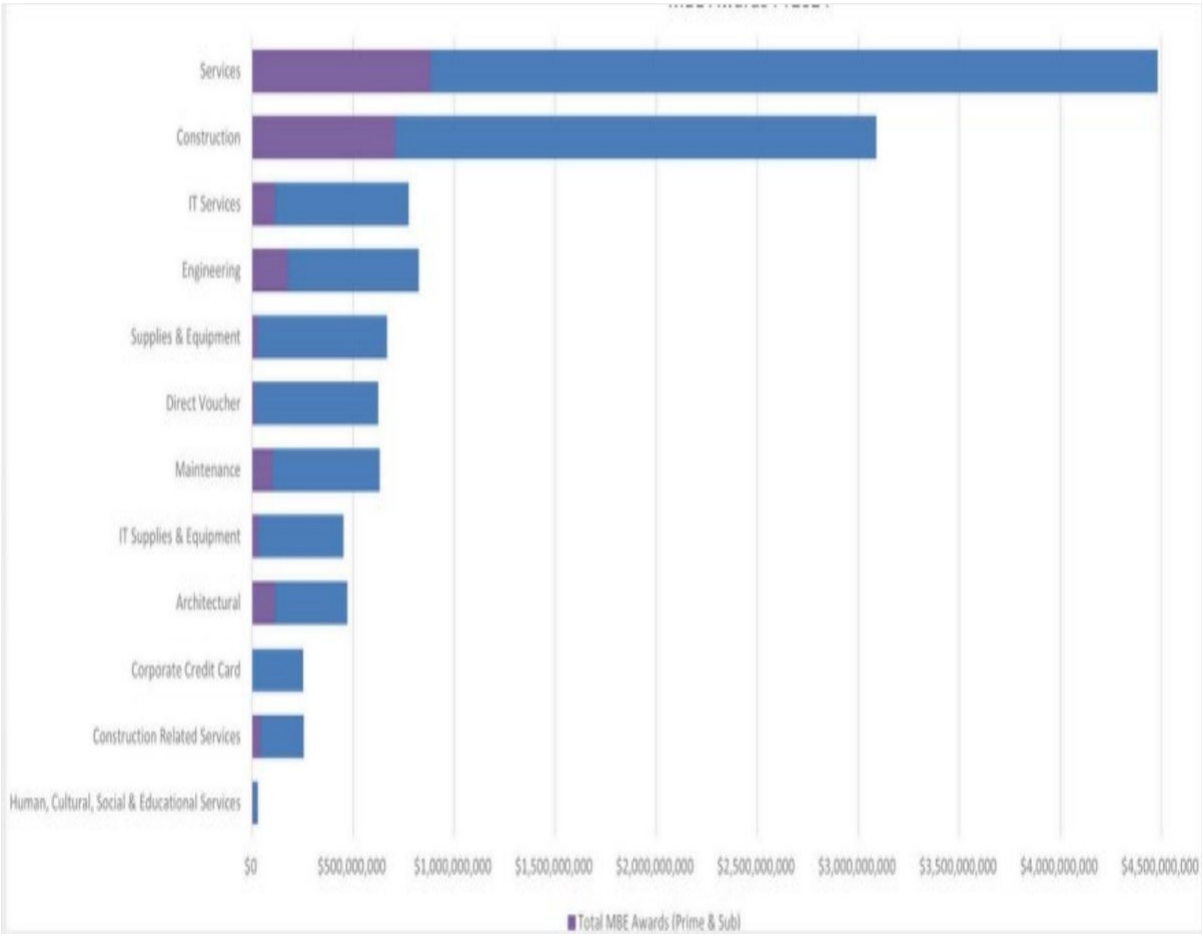
Number of MBE firms to receive payments increased by 14%

Payments to MBEs prime contractors increased by 161%

Payments to MBE subcontractors increased by 8%



MBE Awards by Procurement Category



Top three procurement categories for MBE Awards:

- Services
- Construction
- Engineering

It is important for agencies to enter their industry data correctly to ensure the data is being captured accurately

Fiscal year 2024 was the first year in which agencies and departments were required to report real property title insurance services awards to GOSBA

Be sure to be inquisitive and collaborate with your agencies team that is handling real property titling services to be prepared for Annual Reporting time!

Fiscal Year 2024	
Agency Submission Status	
No Data to Report	64
Non-Responsive	5
Reported Real Property Title Insurance Service Awards in FY24	2
Total Participating Agencies	71

Fiscal Year 2024						
Real Property Title Insurance Services Awards (RPTIS)						
Agency Name	Total number (#) of RPTIS contracts awarded	Total dollar ($) amount of RPTIS contracts awarded	Total number (#) of RPTIS contracts awarded to MBE Prime Contractors	Total dollar ($) amount of RPTIS contracts awarded to MBE Prime Contractors	Total number (#) of RPTIS contracts awarded to MBE Subcontractors	Total dollar ($) amount of RPTIS contracts awarded to MBE Subcontractors
Department of General Services	9	$180,000.00	2	$40,000.00	0	$0.00
Transit Administration	0	$0.00	1	$3,768,400.00	1	$433,366.00

QTR 2 Findings

AGENCY SUBMISSIONS QTR2

Quarterly data is submitted directly to the Governors Office
Timely and accurate submissions are required 30 days at the end of each quarter
Next report will be due for QTR 3 on April 30, 2025

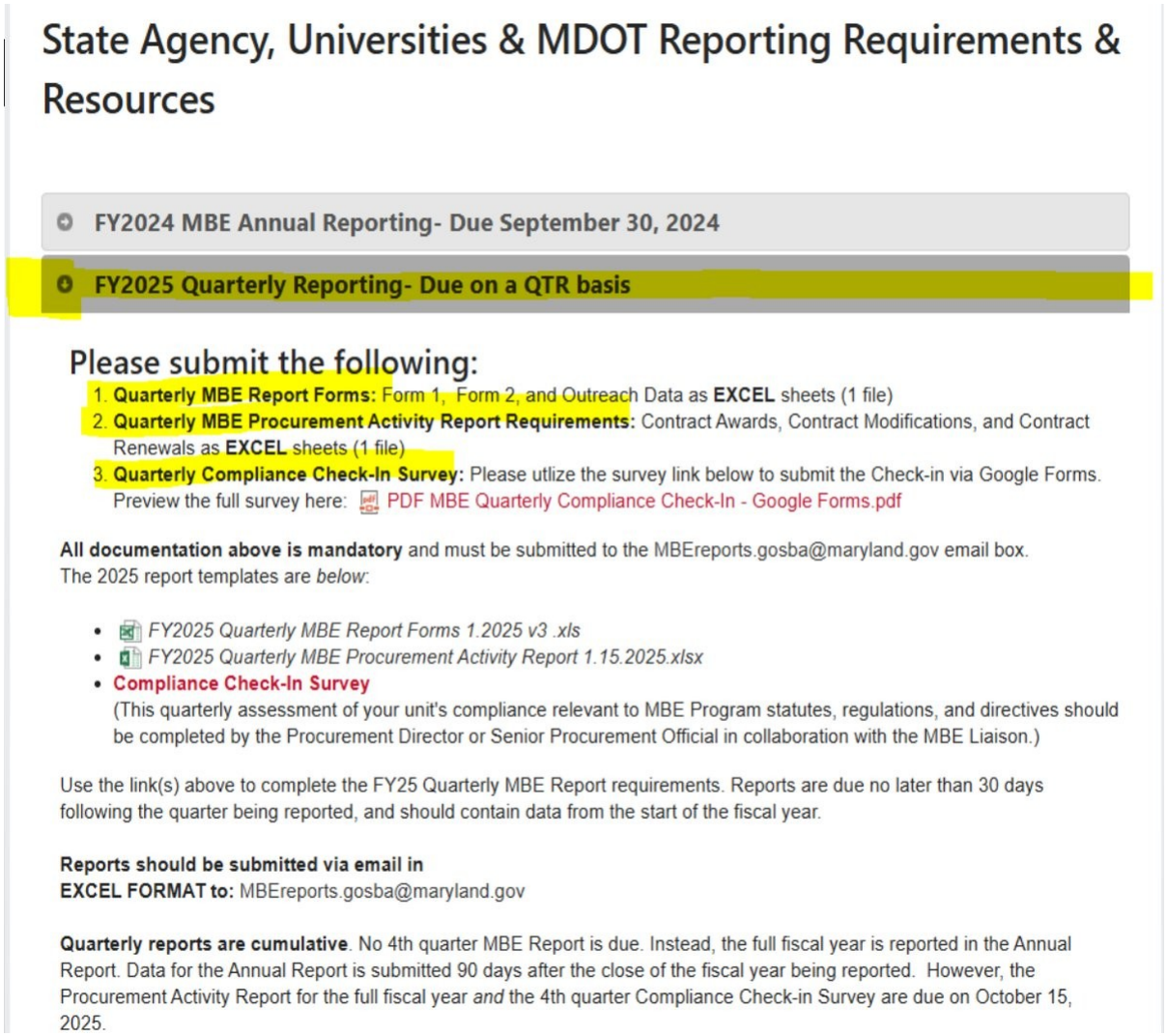
Agency Submission Status	# of Agency Submissions for MBE Procurement Activity Report
SUBMISSION RECEIVED	54
NO SUBMISSION	18
MBE Participation Agency Total	72

Agency Submission Status	# of Agency Submissions for MBE Participation Data
SUBMISSION RECEIVED	56
NO SUBMISSION	16
Grand Total	72

3 Submissions are required for the MBE Program on a quarterly basis:

- o QTR MBE Report Forms 1 & 2 (Excel file)
- o QTR MBE Procurement Activity Report (Excel File)
- o Quarterly Compliance Check-In Survey (Google Form)

QTR Submission Requirements



State Agency, Universities & MDOT Reporting Requirements & Resources

FY2024 MBE Annual Reporting- Due September 30, 2024

FY2025 Quarterly Reporting- Due on a QTR basis

Please submit the following:

1. **Quarterly MBE Report Forms:** Form 1, Form 2, and Outreach Data as **EXCEL** sheets (1 file)
2. **Quarterly MBE Procurement Activity Report Requirements:** Contract Awards, Contract Modifications, and Contract Renewals as **EXCEL** sheets (1 file)
3. **Quarterly Compliance Check-In Survey:** Please utlize the survey link below to submit the Check-in via Google Forms. Preview the full survey here: PDF MBE Quarterly Compliance Check-In - Google Forms.pdf

All documentation above is mandatory and must be submitted to the MBEreports.gosba@maryland.gov email box.
The 2025 report templates are *below*:

- *FY2025 Quarterly MBE Report Forms 1.2025 v3 .xls*
- *FY2025 Quarterly MBE Procurement Activity Report 1.15.2025.xlsx*
- **Compliance Check-In Survey**
  (This quarterly assessment of your unit's compliance relevant to MBE Program statutes, regulations, and directives should be completed by the Procurement Director or Senior Procurement Official in collaboration with the MBE Liaison.)

Use the link(s) above to complete the FY25 Quarterly MBE Report requirements. Reports are due no later than 30 days following the quarter being reported, and should contain data from the start of the fiscal year.

Reports should be submitted via email in EXCEL FORMAT to: MBEreports.gosba@maryland.gov

Quarterly reports are cumulative. No 4th quarter MBE Report is due. Instead, the full fiscal year is reported in the Annual Report. Data for the Annual Report is submitted 90 days after the close of the fiscal year being reported. However, the Procurement Activity Report for the full fiscal year *and* the 4th quarter Compliance Check-in Survey are due on October 15, 2025.

Quick snapshot of new QTR data points

Quick snapshot of new QTR data points DIRECT SOLICITATIONS

Percent (%) of Renewals with MBE Goals	Percent (%) of Renewals that Met MBE Goal at Time of Renewal	Percent (%) of Renewals that did NOT Meet MBE Goal at Time of Renewal	Percent (%) of Renewals with MBE PRIMES
61.38%	15.73%	13.48%	2.76%

Percent (%) of Contracts with MBE Goals	Percent (%) of Contracts with MBE PRIMES
3.80%	7.28%

RENEWA LS

Total Quantity (#) of Direct Solicitations	Percent (%) of Direct Solicitations Made to MBEs
39535	1.89%

AWARDS

DIRECT SOLICITATIONS

NEW Training structure for MBE reporting

NEW QTR Report Trainings Several virtual quarterly reporting trainings will now be available the month prior to reports being due

These trainings will be in a shorter format to clarify and break down the reporting requirements Official training dates & details will be released in March 2025

QTR 3 trainings for MBE will be hosted between the dates of April 1 -April 25

NEW ANNUAL Report Trainings Several virtual annual reporting trainings will now be available the 3 months prior to reports being due

These trainings will be in a shorter format to clarify the varying reporting requirements in a more digestible format Official training dates & details will be released in May 2025

Annual reporting trainings for MBE will be hosted between the dates of July 1 – September 25

ATTENDANCE IS KEY!

Attending training sessions, is essential to your role as a liaison and your agencies compliance to the MBE program

If your agency becomes non-compliant, attendance will play a factor on whether the

- agency is doing the necessary due diligence to comply with the MBE program
- Turnover happens, GOSBA is here to support your agency with those transitions as well

If you are unable to attend one of the training sessions, contact your designated MBE Compliance Manager to schedule a one-on-one session

ATTENDANCE IS KEY!

Best practices!

Stay in touch with your designated MBE Compliance Manager

- Any questions you may have do not be afraid to ask
- Put a meeting on our calendar by utilizing our Calendly links

Collaborate with your agencies procurement, outreach, and other departments who play apart in executing the MBE program requirements

Watch the reporting training videos available to you in the toolkit 24/7

Utilize the MBE Supplemental Reporting Guidance & Socioeconomic Data Reporting Guidance when reporting

AS ALWAYS, IF YOU HAVE QUESTIONS AFTER TODAY'S TRAINING, PLEASE CONTACT US:

KAREN REYES KAREN.REYES@MARYLAND.GOV

SCHEDULE A ONE -O N -O N E : Calendly -Karen Reyes -GOSBA-

TIARA RANDOLPH TIARA.RANDOLPH@MARYLAND.GOV

SCHEDULE A ONE -O N -O N E :

Calendly -Tiara Randolph -GOSBA-

VSBE Program updates Danielle Davis VSBE Compliance manager

COMAR 21.11.14.01-

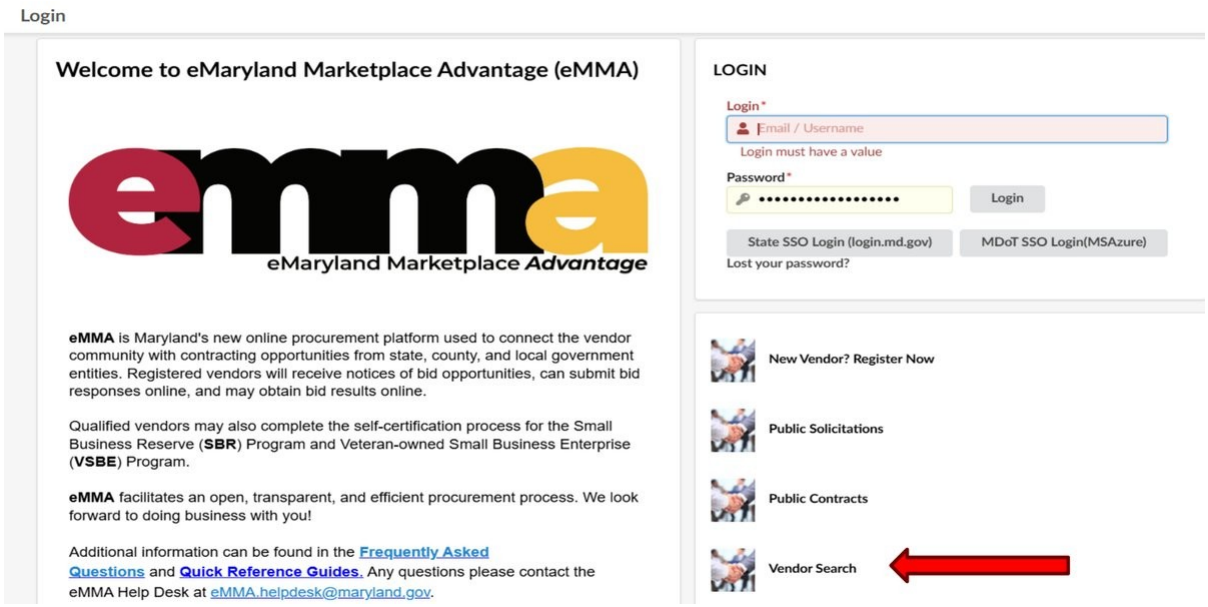
A. Each procurement agency shall structure its procedures for making procurements to try to achieve an overall minimum of 3 percent of the unit's total dollar value of all procurement contracts made directly or indirectly with veteran-owned small business enterprises;

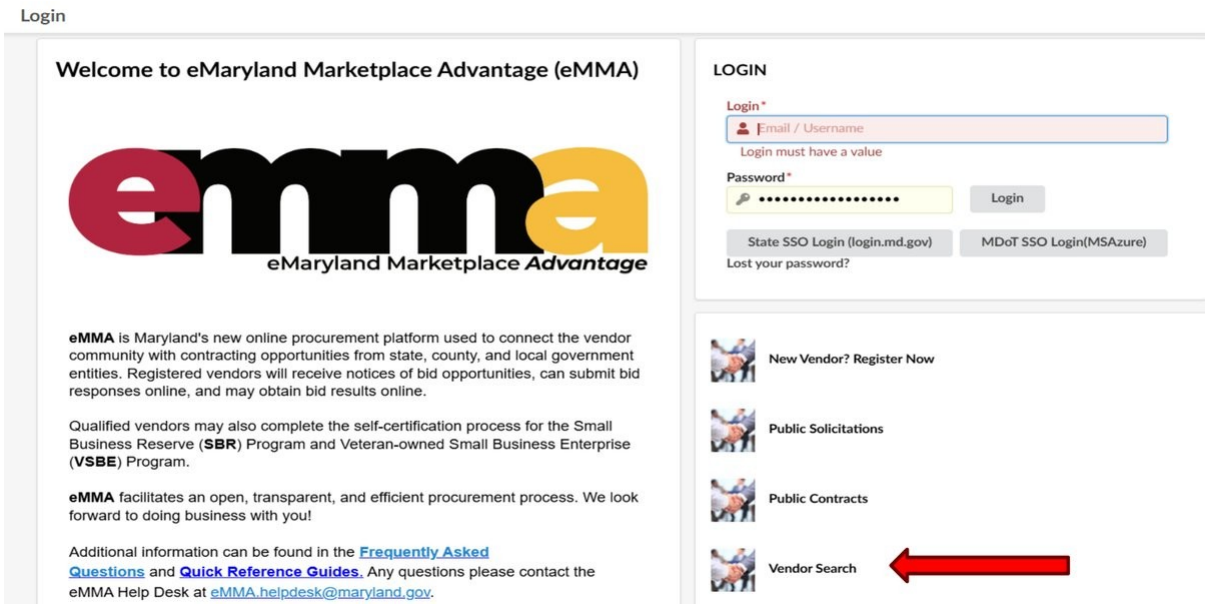
VSBE REMINDERS COMAR 21.11.14.01A. Each procurement agency shall structure its procedures for making procurements to try to achieve an overall minimum of 3 percent of the unit's total dollar value of all procurement contracts made directly or indirectly with veteran-owned small business enterprises;

VSBE REMINDERS All certified VSBES are only found in eMaryland Marketplace Advantage (eMMA)

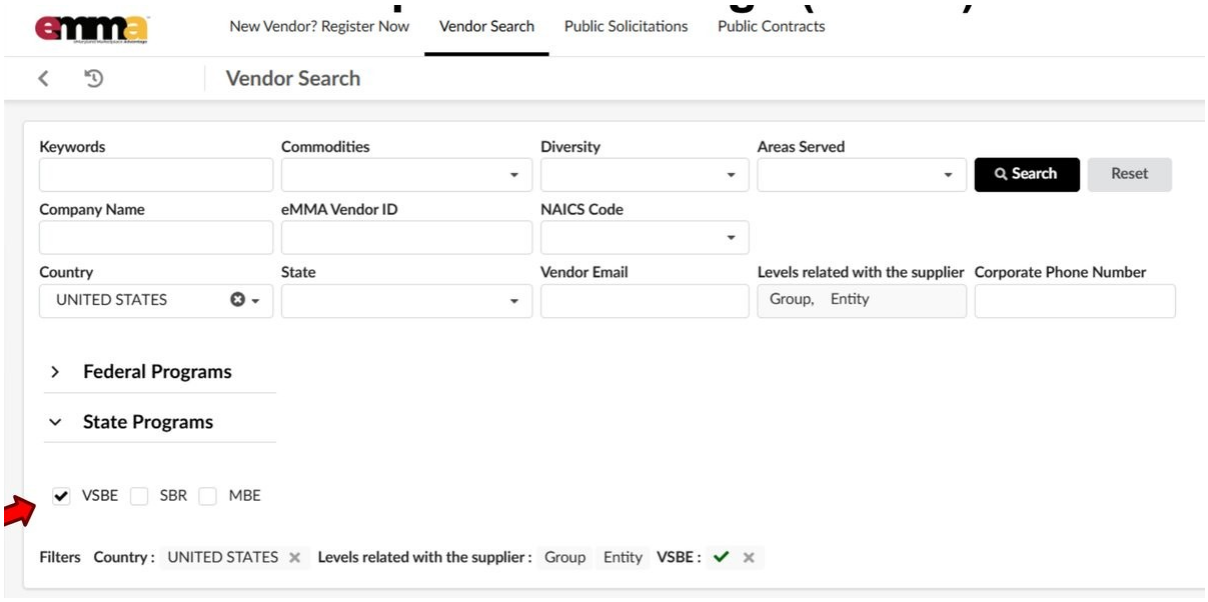
VSBE REMINDERS All certified VSBES are only found in eMaryland Marketplace Advantage (eMMA)

All certified VSBES are only found in eMaryland Marketplace Advantage (eMMA)





All certified VSBES are only found in eMaryland Marketplace Advantage (eMMA)

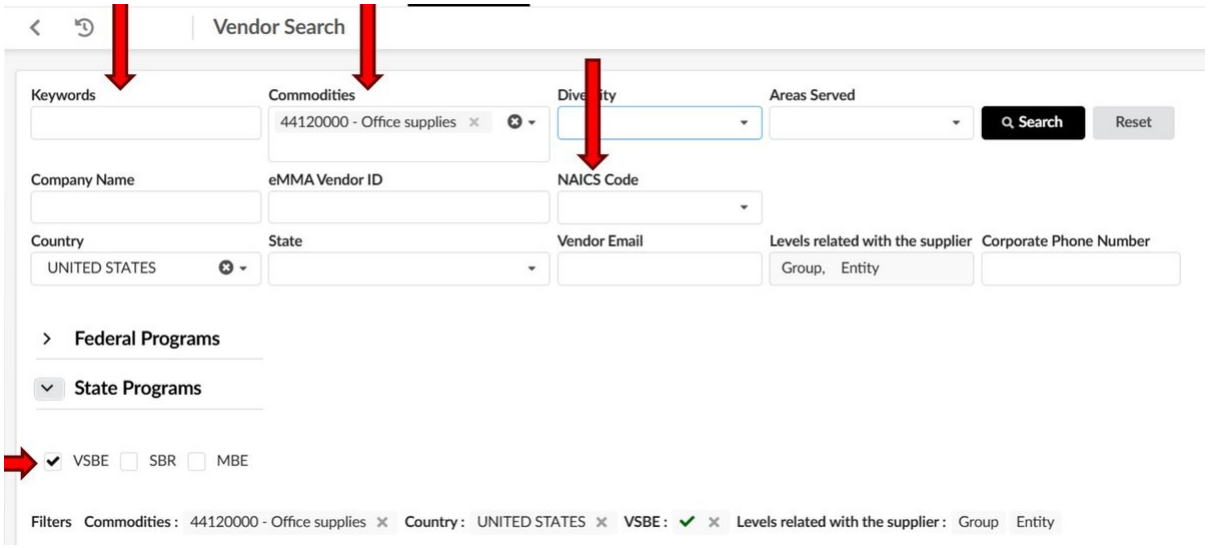


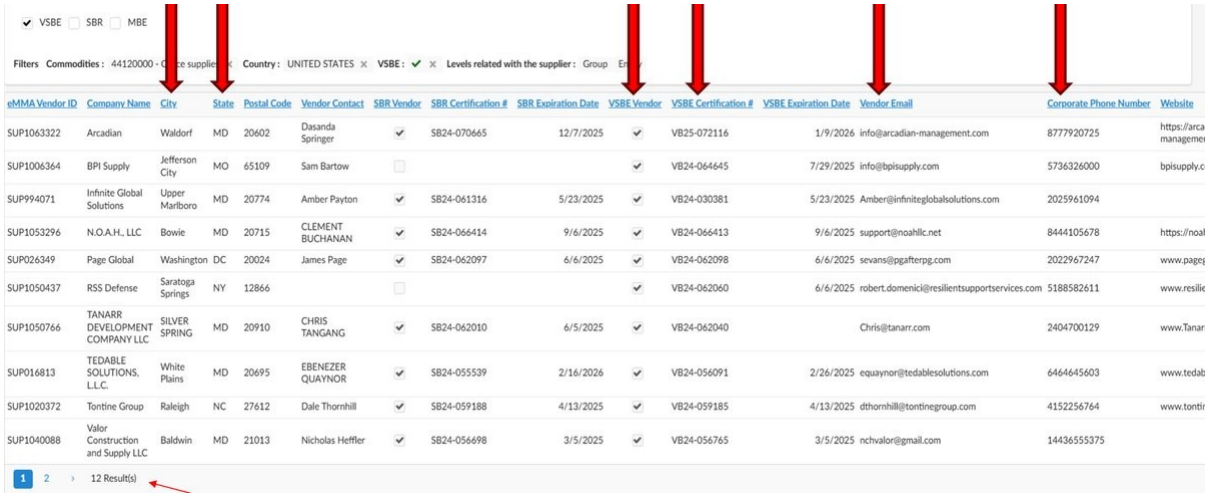
For this example, we are using a Commodity Code. Make sure the VSBE Vendor flag is checked

VSBE REMINDERS For this example, we are using a Commodity Code. Make sure the VSBE Vendor flag is checked

VSBE REMINDERS

https://gomdsmallbiz.maryland.gov/Reports/Fiscal%20Year%202024.pdf



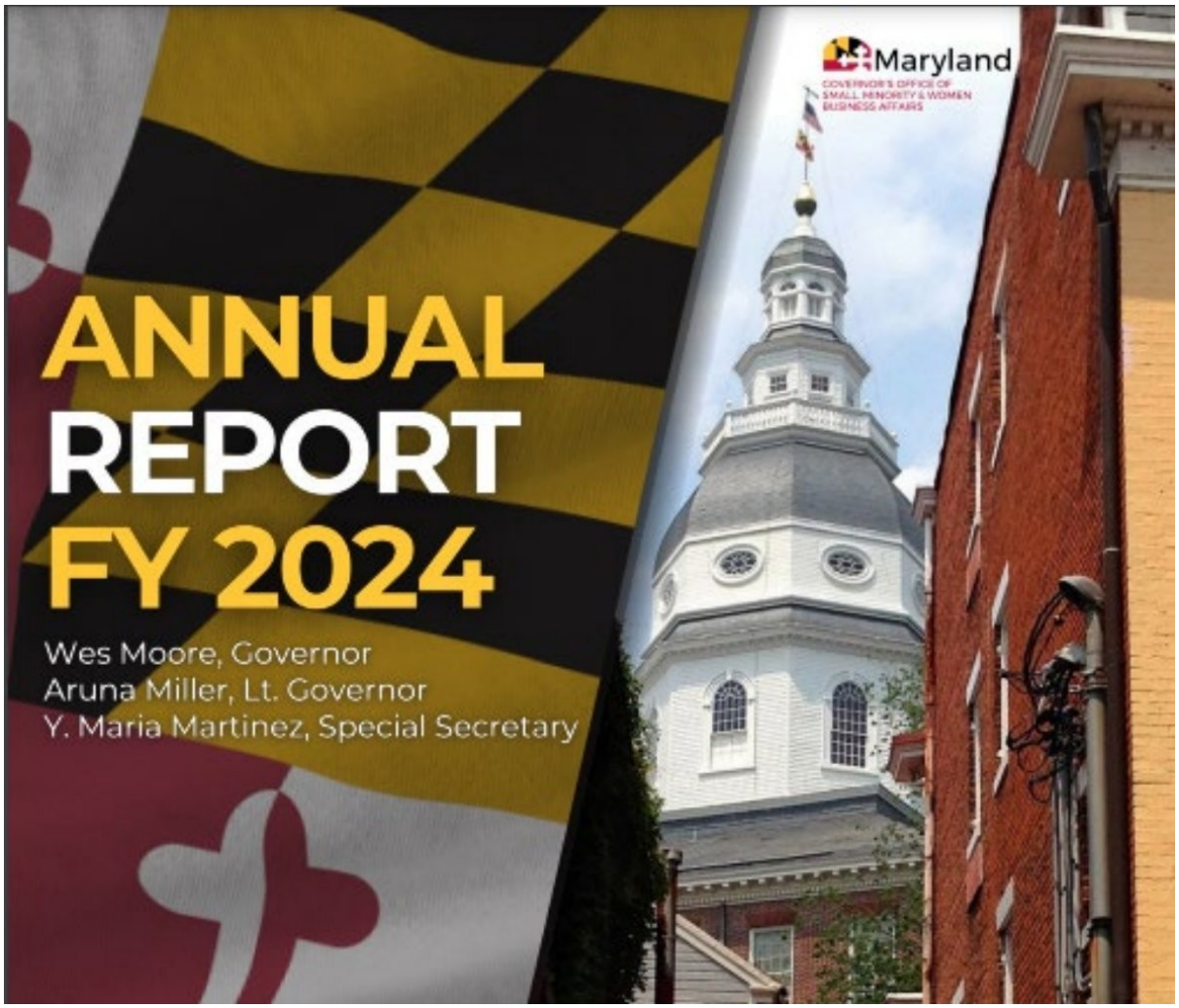


eMMA Vendor ID	Company Name	City	State	Postal Code	Vendor Contact	SBR Vendor	SBR Certification #	SBR Expiration Date	VSBE Vendor	VSBE Certification #	VSBE Expiration Date	Vendor Email	Corporate Phone Number	Website
SUP1063322	Arcadian	Waldorf	MD	20602	Dasanda Springer	✓	SB24-070665	12/7/2025	✓	VB25-072116	1/9/2026	info@arcadian-management.com	8777920725	https://arca manageme
SUP1006364	BPI Supply	Jefferson City	MO	65109	Sam Bartow				✓	VB24-064645	7/29/2025	info@bpisupply.com	5736326000	bpisupply.c
SUP994071	Infinite Global Solutions	Upper Marlboro	MD	20774	Amber Payton	✓	SB24-061316	5/23/2025	✓	VB24-030381	5/23/2025	Amber@infiniteglobalsolutions.com	2025961094	
SUP1053296	N.O.A.H., LLC	Bowie	MD	20715	CLEMENT BUCHANAN	✓	SB24-066414	9/6/2025	✓	VB24-066413	9/6/2025	support@noahllc.net	8444105678	https://noal
SUP026349	Page Global	Washington	DC	20024	James Page	✓	SB24-062097	6/6/2025	✓	VB24-062098	6/6/2025	sevans@pgafterpg.com	2022967247	www.page
SUP1050437	RSS Defense	Saratoga Springs	NY	12866					✓	VB24-062060	6/6/2025	robert.domenici@resilientsupportservices.com	5188582611	www.resilie
SUP1050766	TANARR DEVELOPMENT COMPANY LLC	SILVER SPRING	MD	20910	CHRIS TANGANG	✓	SB24-062010	6/5/2025	✓	VB24-062040		Chris@tanarr.com	2404700129	www.Tanar
SUP016813	TEDABLE SOLUTIONS, L.L.C.	White Plains	MD	20695	EBENEZER QUAYNOR	✓	SB24-055539	2/16/2026	✓	VB24-056091	2/26/2025	equaynor@tedablesolutions.com	6464645603	www.tedab
SUP1020372	Tontine Group	Raleigh	NC	27612	Dale Thornhill	✓	SB24-059188	4/13/2025	✓	VB24-059185	4/13/2025	dthornhill@tontinegroup.com	4152256764	www.tontir
SUP1040088	Valor Construction and Supply LLC	Baldwin	MD	21013	Nicholas Heffler	✓	SB24-056698	3/5/2025	✓	VB24-056765	3/5/2025	nchvalor@gmail.com	14436555375	

1 2 › 12 Result(s)

FY2024 VSBE Analytics

New FY24 annual report





VSBE FY24 HIGHLIGHTS

30 units made awards to VSBEs out of 51 participating units
727 prime awards and 68 subcontract awards were made to VSBEs
$124.2 Million was awarded to VSBEs
104 VSBEs vendors received payment
14 units made their 1% VSBE goal

These units each contributed significantly to the increase in awards made in FY24:

Department of Human Services
Department of Public Safety & Correctional Services
Department of Health
Department of General Services
Maryland Transportation Authority

VSBE FY24 HIGHLIGHTS

Overall VSBE statewide participation rate, increasing by 144 percent from 0.75% in FY23 to 1.83%in FY24
In FY2024, 504new veteran businesseswere certified as VSBEs, while 186 expired businesses reentered the program after their certification expired

We have work to do!

30% of Units reported they did not have a defined outreach strategy to veteran-owned businesses

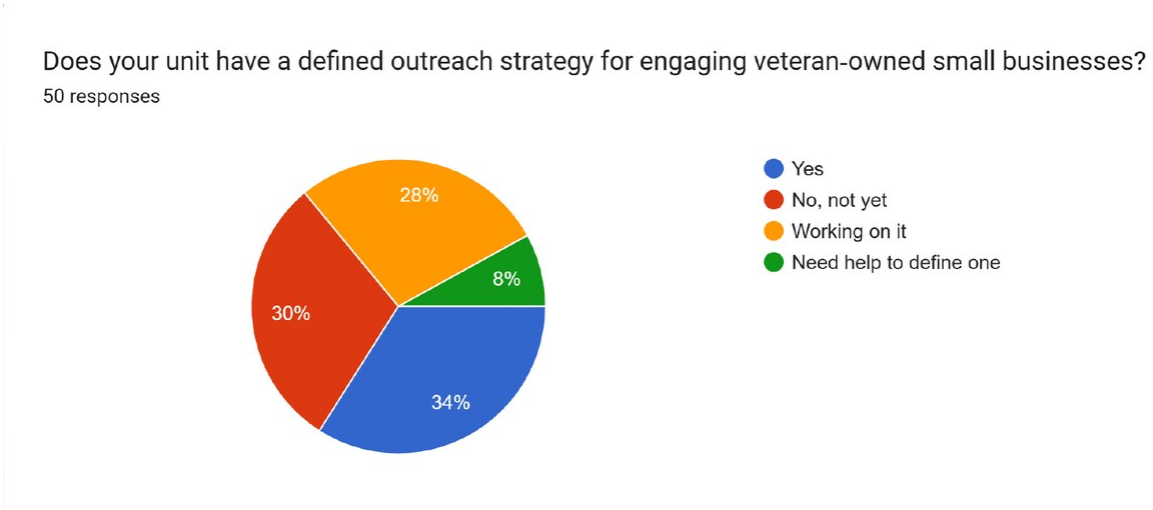
We have work to do!

46% of Units did not solicit to VSBEs



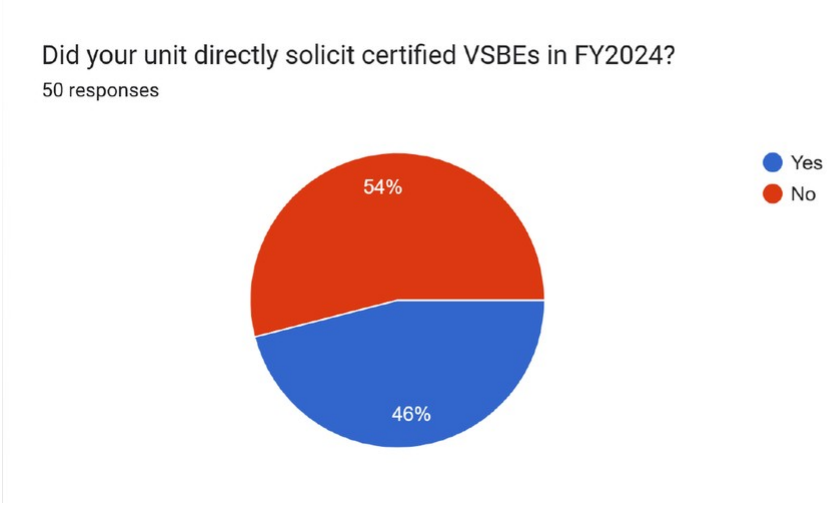
VSBE FY24 Outreach dATA

We have work to do!



VSBE FY24 Outreach dATA

We have work to do!

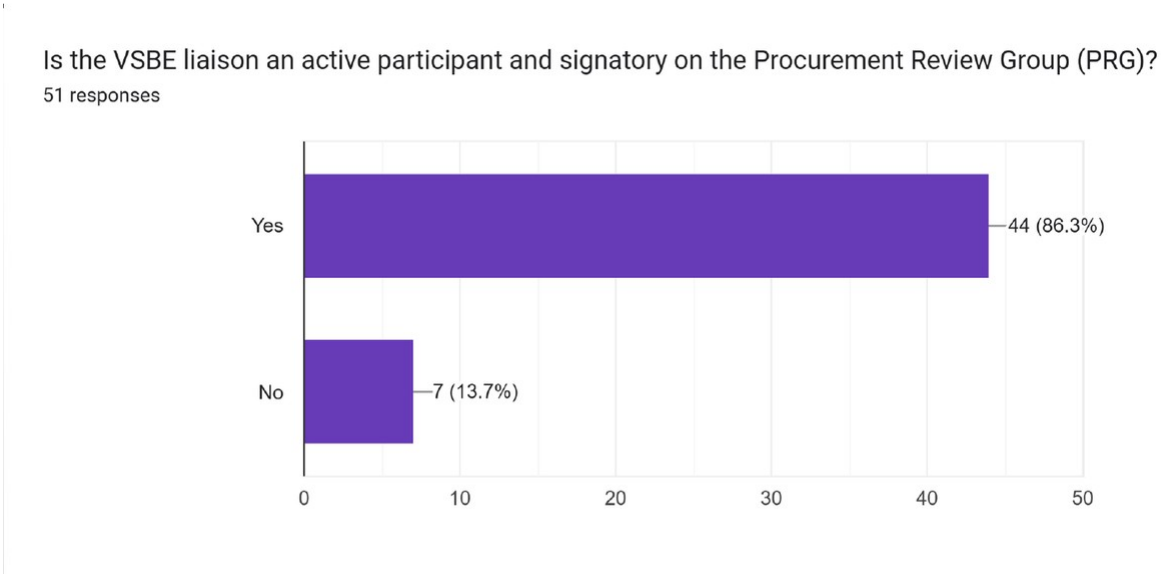


FY25 VSBE STRAGETIC PLANS

VSBE FY25 STRAGETIC PLAN THEMES

VSBE Liaison is required to be involved in the PRG process

13.7% of VSBE Liaisons are not apart of the PRG process

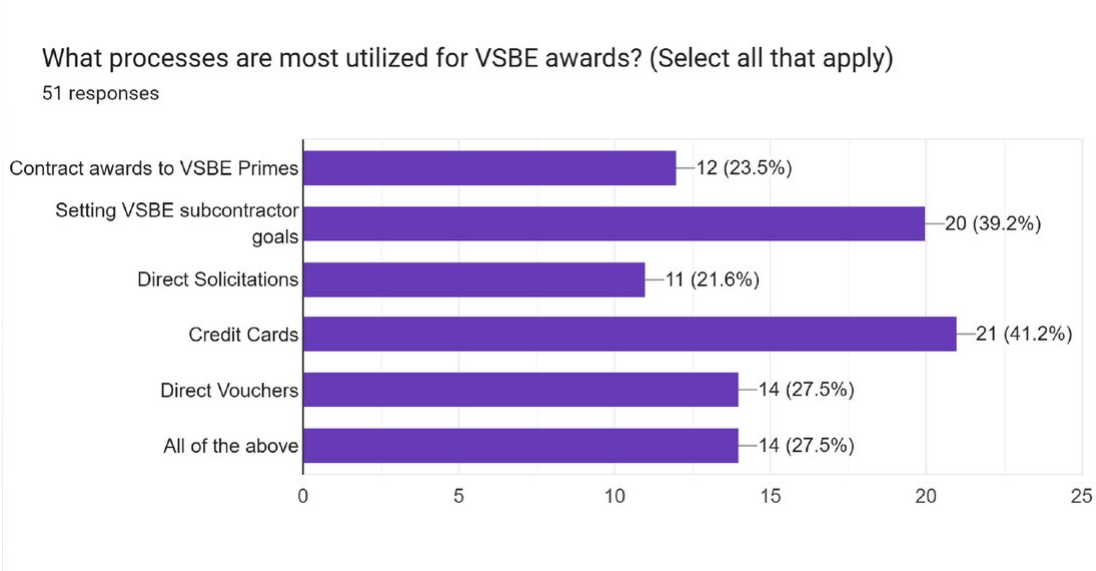


VSBE FY25 STRAGETIC PLAN THEMES

Outreach= More vendors getting certified

On average, I add about 10 new vendors a week into the VSBE database

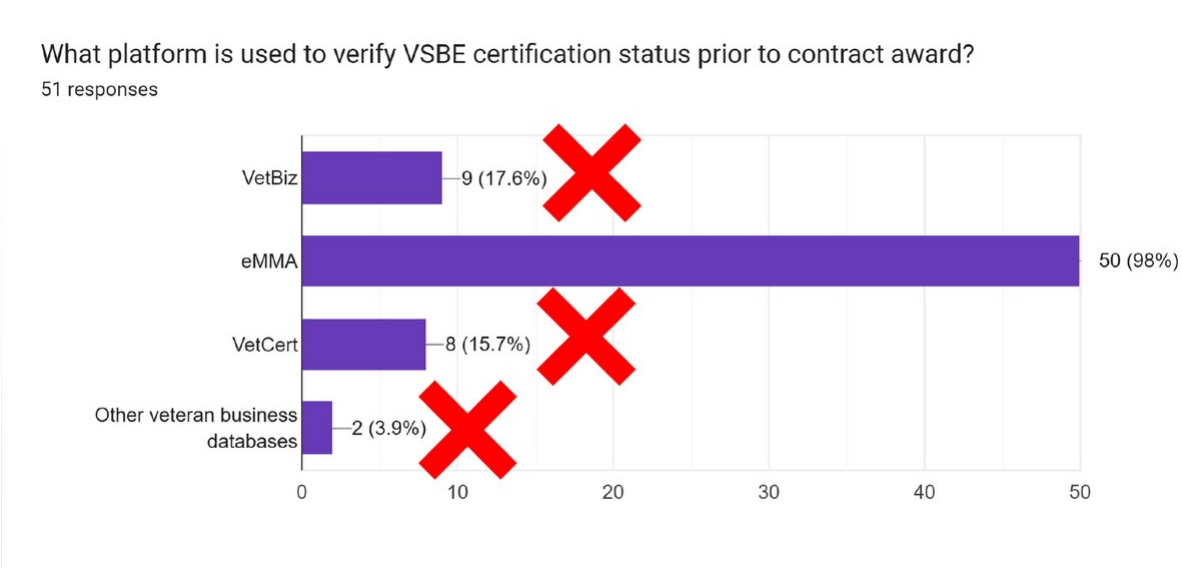
Credit Cards were the most utilized process for awards for VSBEs



VSBE FY25 STRAGETIC PLAN THEMES

Platforms for VSBE Certification

Vsbe toolkit The VSBE Toolkit is the home for all report preparers and Liaisons for templates and tools to be successful. Submissions are MANDATORY! Reports are cumulative! https://gomdsmallbiz.maryland.gov/Pages/ReportingTool-VSBE.aspx goMDsmallbiz.maryland.gov



VSBE Reporting

Vsbe toolkit



The VSBE Toolkit is the home for all report preparers and Liaisons for templates and tools to be successful.

Submissions are MANDATORY!

Reports are cumulative!

https://gomdsmallbiz.maryla nd.gov/Pages/Reporting-Tool-VSBE.aspx

VSBE Quarterly Reporting

Veteran-Owned Small Business Enterprise (VSBE) Quarterly Report

Fiscal Year 2024

Beginning in Fiscal Year 2019, the work of firms verified by the Center For Veterans Enterprise of the United States Department of Veterans Affairs or the Maryland Department of Veterans Affairs may be counted toward a defined VSBE contract goal (see COMAR 21.11.14).

INSTRUCTIONS: Complete all yello cells. Automatic calculations will appear in blue cells. Do not edit this template

Agency Reporting:

Individual Completing Report:

Awards to VSBEs

	Total # All Procurement Contracts Awarded	Total $ All Procurement Contracts Awarded	Total # Contracts Awarded to VSBEs as Prime Contractors	Total $ Contracts Awarded to VSBEs as Prime Contractors	Total # VSBE Subcontracts Awarded	Total $ VSBE Subcontracts Awarded
Procurement Contracts	QTY	709 & 710 Rpts Combined Total	QTY	VSBE 710	QTY	VSBE 720 Rpt
Corporate Credit Card	QTY	721 &/or Internal Report	QTY	VSBE 721/Credit Cards		
Direct Voucher	QTY	717 Data	QTY	VSBE 717		
Total		$0		$0		$0
	Should match MBE Rpt total agency awards Form					

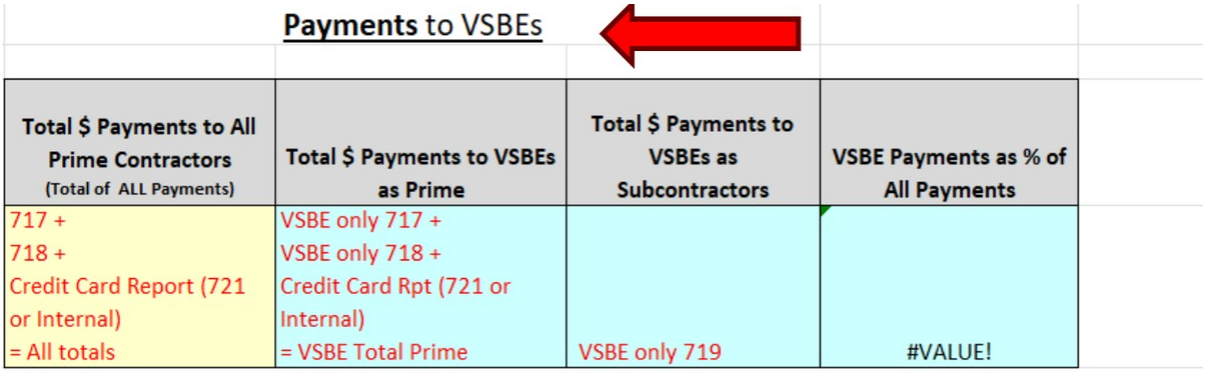
	Total # All Procurement Contracts Awarded	Total $ All Procurement Contracts Awarded
Procurement Contracts	QTY	709 & 710 Rpts Combined Total
Corporate Credit Card	QTY	721 &/or Internal Report
Direct Voucher	QTY	717 Data
Total		$0
	Should match MBE Rpt total agency awards Form	

Total # Contracts Awarded to VSBEs as Prime Contractors	Total $ Contracts Awarded to VSBEs as Prime Contractors	Total # VSBE Subcontracts Awarded	Total $ VSBE Subcontracts Awarded
QTY	VSBE 710	QTY	VSBE 720 Rpt
QTY	VSBE 721/Credit Cards		
QTY	VSBE 717		
	$0		$0

Payments to VSBEs

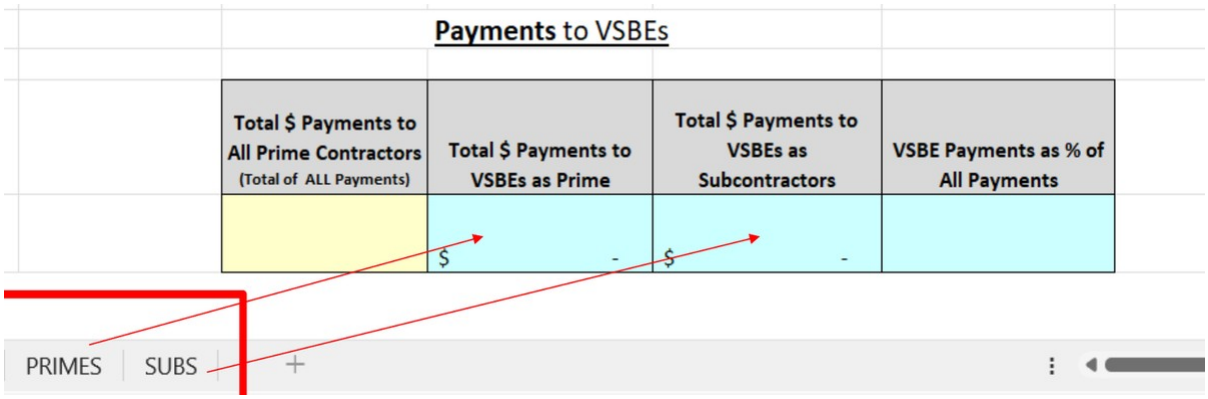
Total $ Payments to All Prime Contractors (Total of ALL Payments)	**Total $ Payments to VSBEs as Prime**	**Total $ Payments to VSBEs as Subcontractors**	**VSBE Payments as % of All Payments**
717 + 718 + Credit Card Report (721 or Internal) = All totals	VSBE only 717 + VSBE only 718 + Credit Card Rpt (721 or Internal) = VSBE Total Prime	VSBE only 719	#VALUE!

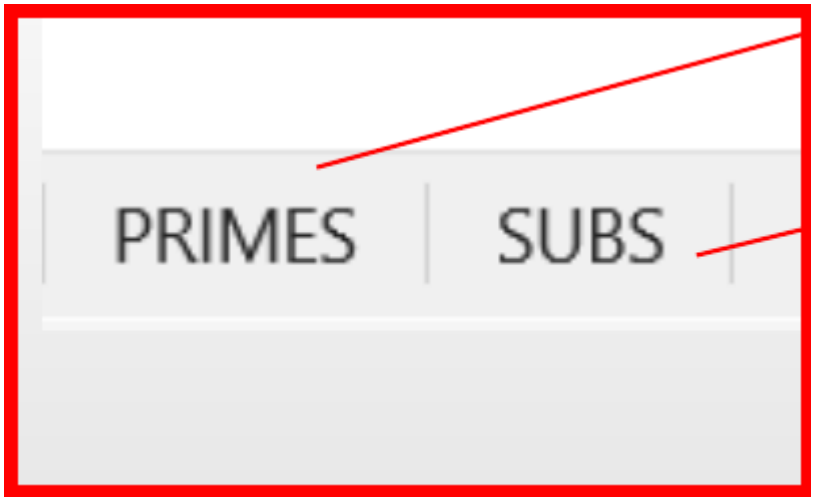
VSBE Quarterly Reporting



Payments to VSBEs

Total $ Payments to All Prime Contractors (Total of ALL Payments)	Total $ Payments to VSBEs as Prime	Total $ Payments to VSBEs as Subcontractors	VSBE Payments as % of All Payments
717 + 718 + Credit Card Report (721 or Internal) = All totals	VSBE only 717 + VSBE only 718 + Credit Card Rpt (721 or Internal) = VSBE Total Prime	VSBE only 719	#VALUE!





Best VSBE REPORTING PRACTICES

1. Run all your data reports with VET flags
2. Scrub out your non-reportable data
3. Open both VSBE Quarterly Templates (you will use certain information on BOTH reports)
4. Start with Awards-Contract Data (709 & 710, 720)
5. Use said scrubbed data for both Quarterly reports
6. Use VET 717 (Direct Vouchers) and 721 (Credit Cards) for both award and payment data on both reports
7. End with rest of payment data scrubbed

VSBE q2 Procurement activity template VSBE Direct Solicitation Tab is specifically only wanting VSBE Awards

VSBE q2 Procurement activity template

VSBE Program Procurement Activity Report

The Moore-Miller Administration has requested VSBE Procurement Activity Reports on a quarterly basis.
Pursuant to COMAR 21.11.14.06 (B.) Each procurement agency shall furnish any other information or periodic reports requested by the Governor's Office of Small, Minority & Women Business Affairs in connection with its VSBE procurements, or any other matters related to the administration, effectiveness, or continuation of the VSBE Program.

As outlined in the Instructions tab, the data requested is collected cumulatively and the final submission for FY25 must be reported by VSBE Participating Agencies **on or before October 15, 2025.**

Completed Reports should be submitted electronically by email to **vsbereports.*gosba@maryland.gov***

Agency Name:

Data from the detail tab automatically populates the table below. ***ONLY*** *complete the certification section below the table with your units Quarter 4 submission on October 15, 2024.*

Procurement Activity July 1, 2024 - June 30, 2025	**Total Quantity (#)**	**tal Cumulative Value**	**Total Quantity (#) VSBE Goal Met at Time of Action (Modification or**	**Total Quantity (#) VSBE Goal Not Met at Time of Action**	**Total Quantity (#) of VSBE Prime Contractors Awarded**
All contract awards issued	0	$0			0
All contract awards with VSBE goals	0				
All contract modifications	0	$0			0
All contracts modified that had VSBE goals	0		0	0	
All contract renewal options exercised	0	$0			0
All contracts whose renewal options were exercised that had VSBE goals	0		0	0	

Direct Solicitations July 1, 2024 - June 30, 2025	**Total Quantity Direct Vouchers (#)**	**Total Quantity Credit Cards (#)**	**Total Cumulative Value of Direct Solicitations($)**
All Direct Solicitations (DV and CC)	0	0	$0
(#) of VSBE Vendors Direct Solicited	0		

VSBE q2 Procurement activity template

VSBE Program Procurement Activity Report

Cumulative Data Collection: *Procurement Activity Detail for July 1, 2024 through June 30, 2025*

Direct Solicitation- Vendor Name (Credit Card and Direct Vouchers)		**DV OR CC?**	**Value ($)**	**VSBE Vendor (Select from Dropdown)**

Awards to VSBEs

Total # Contracts Awarded to VSBEs as Prime Contractors	Total $ Contracts Awarded to VSBEs as Prime Contractors	
QTY	VSBE 710	Q
QTY	VSBE 721/Credit Cards	
QTY	VSBE 717	
	$0	

VSBE q3 Procurement activity template

Direct Solicitations July 1, 2024 - June 30, 2025	Total Quantity Direct Vouchers (#)	Total Quantity Credit Cards (#)	Total Cumulative Value of Direct Solicitations($)
All Direct Solicitations to VSBEs (DV and CC)	QTY 717 VET FLAG	QTY 721 VET FLAG	$ VSBE 717 & 721
(#) of VSBE Vendors Direct Solicited			

Data from the detail tab automatically populates the table below. ***ONLY*** *complete the certification section below the table with your units Quarter 4 submission on October 15, 2024.*

Procurement Activity July 1, 2024 - June 30, 2025	Total Quantity (#)	Total Cumulative Value ($)	VSBE Goal Met at Time of Action (Modification or Renewal)	(#) VSBE Goal Not Met at Time of Action (Modification or	Total Quantity (#) of VSBE Prime Contractors Awarded
All contract awards issued	QTY	$710			710 VET FLAG
All contract awards with VSBE goals	0				
All contract modifications	QTY	$709			709 VET FLAG
All contracts modified that had VSBE goals	0		0	0	
All contract renewal options exercised	Internal Process	$0			0
All contracts whose renewal options were exercised that had VSBE goals	0		0	0	

All Direct Solicitations to VSBEs (DV and CC)

VSBE quarterly updates

Quarter 1

Number of Units submitted-47

Total Dollars Awarded thus far in FY25-$6,904,241
36 agencies had reached VSBE participation lower than 1%
9 agencies had reached VSBE participation between 1%-3%
2 agencies had achieved VSBE participation higher than 3%

Quarter 2

Number of Units submitted-43
Total Dollars Awarded thus far in FY25-$30,555,446
34 units reached VSBE participation lower than 1%
5 units reached VSBE participation between 1%-3%
4 units achieved VSBE participation higher than 3%
18 of 43 units have made 0 awards to VSBEs

VSBE upcoming

Veteran Small Business Preference

Evaluation. When a procurement under COMAR 21.05.02 has been designated for a small business preference, the procurement officer shall accept the most favorable responsive bid from a responsible small business if the bid does not exceed the most favorable responsive bid price received from a responsible bidder that is not certified as a small business by:

(a) More than 5 percent;

(b) More than 7 percent for a veteran-owned small business;

-VSBEs

(c) More than 8 percent for a disabled-veteran-owned small business; or

-https://veterans.certify.sba.gov/#home

(d) The predetermined percentage preference.

Veteran Small Business Preference

On the federal space, their certified veteran businesses will differentiate SDVOSB vs VOSB. Please invite veteran businesses to get VSBE certified!



Athos1 LLC

Service Disabled Veteran Owned Small Business

Certification Information

DUNS	DBA	Last Verified	Expiration Date
118258183	-----	Feb 25, 2022	Feb 25, 2027

Business Information

SAM UEI	Cage Code	Entity Type	Year Established
DCD6DV1BMCN5	95HW9	Limited Liability Company (LLC)	2021

Website
https://www.athos1.com

Business Address 1	Business Address 2	City	State/Territory	Zip Code
6021 University Blvd., Ste. 330	-----	Ellicott City	MD	21043

NAICS CODES

523920	Portfolio Management
541330	Engineering Services
541512	Computer Systems Design Services
541513	Computer Facilities Management Services
541519	Other Computer Related Services
541611	Administrative Management and General Management Consulting Services



3G's Trucking LLC

Veteran Owned Small Business

Certification Information

DUNS	DBA	Last Verified	Expiration Date
111497494	-----	Apr 20, 2021	Apr 20, 2026

Business Information

SAM UEI	Cage Code	Entity Type	Year Established
CWBSHWSBKTQ9	8TMH6	Limited Liability Company (LLC)	-----

Website

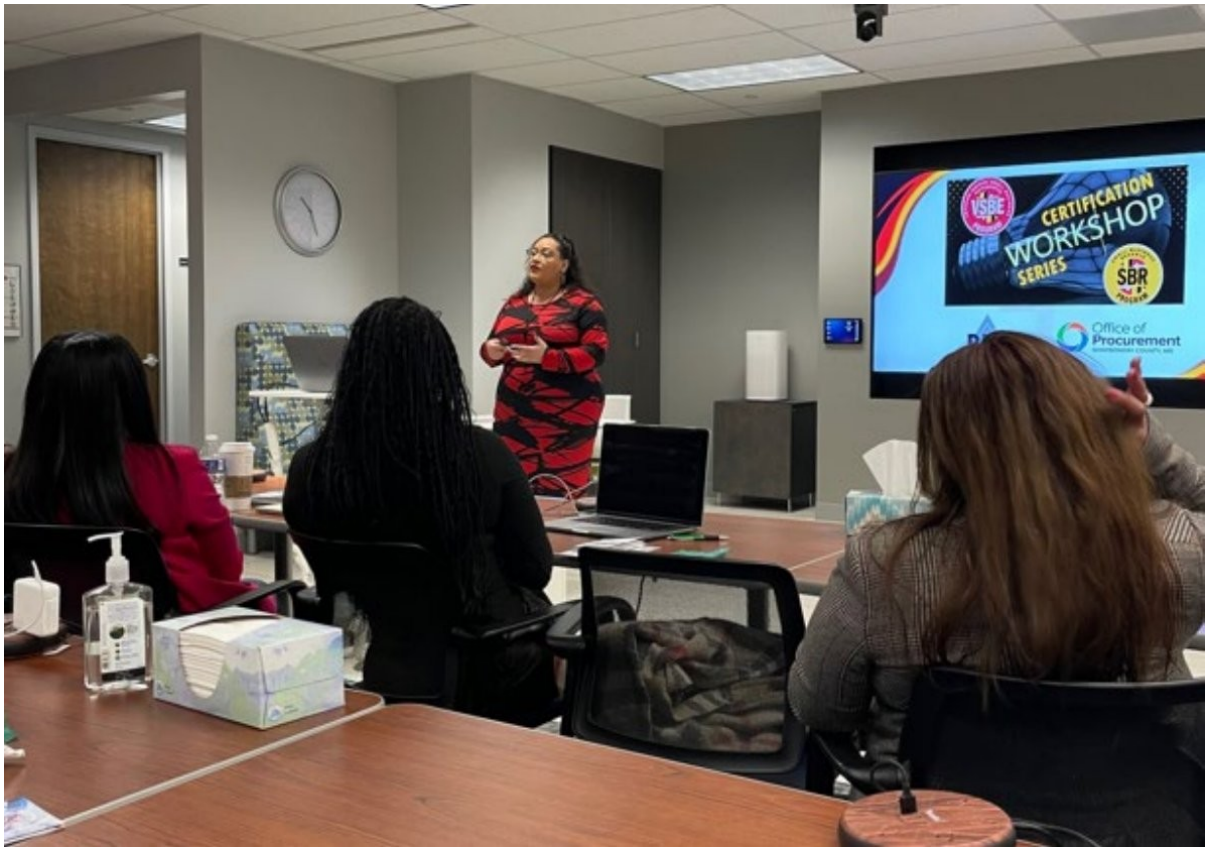
Business Address 1	Business Address 2	City	State/Territory	Zip Code
249 North St.	-----	Saint Michaels	MD	21663

NAICS CODES

484110	General Freight Trucking, Local
484210	Used Household and Office Goods Moving
541611	Administrative Management and General Management Consulting Services

UPCOMING for the vsbe program

VSBE Compliance COMAR chapter to be updated FY26
Veteran definition to be updated to allow even more VSBEs in the database
VSBE specific outreach coming
More VSBE Liaison Specific Training



Thank you

If you would like to set-up a one on one about your unit's VSBE performance or VSBE assistance, email our VSBE Compliance Manager,

Danielle.Davis2@maryland.gov