VSBE LIAISON TRAINING

July 2024

"Reach Further"

PRESENTED BY DANIELLE DAVIS

July 2024 VSBE Liaison Training

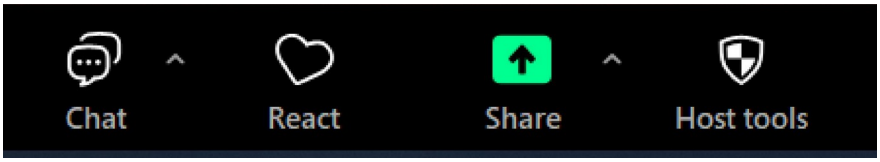
Governor's Office of Small, Minority & Women Business Affairs (GOSBA)

VSBE Liaison Training, July 2024: “Reach Further”

Presented by Danielle Davis

Virtual Training Housekeeping

- Please mute your microphone and keep your video camera is off during training.
- Submit questions in the Chat at the bottom of your screen.
- You may also raise your hand using the React button.
- If clarification is requested by the speaker, you will be asked to unmuted.



Agenda

1. Veteran Landscape & VSBE Program
2. VSBE Liaison Expectations
3. Outreach
4. PRG
5. Searching
6. Best Practices/Compliance
7. Reporting
8. Updates- Next Steps

The Team

Thank you to my GOSBA colleagues here in the back round today, helping facilitate behind the scenes!

Eduardo Hayden

Karen Reyes

A Little About Me



VSBE Compliance Manager

- Army Brat
- Event Planner
- Small Business Owner

Today, I Ask You to Remain Open Minded

Veteran Landscape

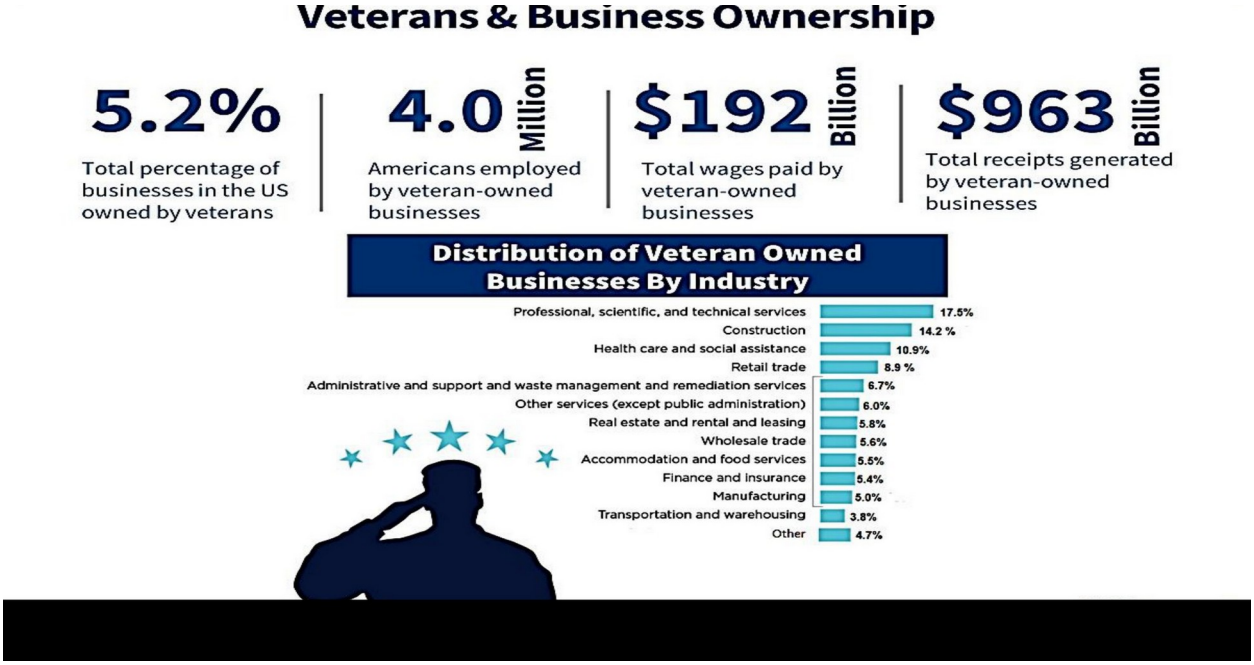
National Stats

Veterans & Business Ownership

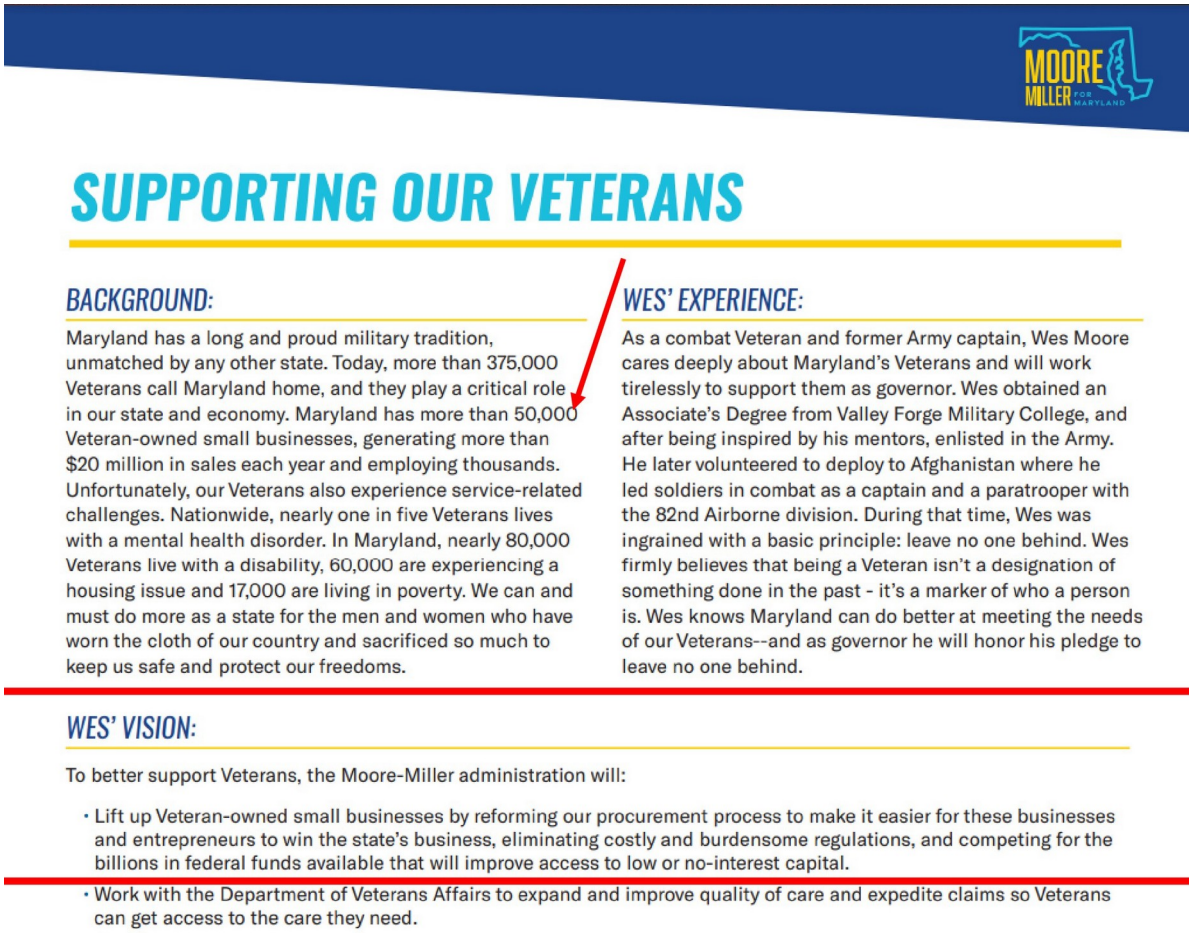
- 5.2%: Total percentage of businesses in the US owned by veterans
- 4.0 Million: Americans employed by veteran-owned businesses
- $192 Billion: Total wages paid by veteran-owned businesses
- $963 Billion: Total receipts generated by veteran-owned businesses

Distribution of Veteran Owned Businesses by Industry	Percent
Professional, scientific, and technical services	17.5%
Construction	14.2%
Health care and social assistance	10.9%
Retail trade	8.9%
Administrative and support and waste management and remediation services	6.7%
Other services (except public administration)	6.0%
Real estate and rental and leasing	5.8%
Wholesale trade	5.6%
Accommodation and food services	5.5%
Finance and insurance	5.4%
Manufacturing	5.0%

Distribution of Veteran Owned Businesses by Industry	Percent
Transportation and warehousing	3.8%
Other	4.7%



Supporting Our Veterans



SUPPORTING OUR VETERANS

BACKGROUND:

Maryland has a long and proud military tradition, unmatched by any other state. Today, more than 375,000 Veterans call Maryland home, and they play a critical role in our state and economy. Maryland has more than 50,000 Veteran-owned small businesses, generating more than $20 million in sales each year and employing thousands. Unfortunately, our Veterans also experience service-related challenges. Nationwide, nearly one in five Veterans lives with a mental health disorder. In Maryland, nearly 80,000 Veterans live with a disability, 60,000 are experiencing a housing issue and 17,000 are living in poverty. We can and must do more as a state for the men and women who have worn the cloth of our country and sacrificed so much to keep us safe and protect our freedoms.

WES' EXPERIENCE:

As a combat Veteran and former Army captain, Wes Moore cares deeply about Maryland's Veterans and will work tirelessly to support them as governor. Wes obtained an Associate's Degree from Valley Forge Military College, and after being inspired by his mentors, enlisted in the Army. He later volunteered to deploy to Afghanistan where he led soldiers in combat as a captain and a paratrooper with the 82nd Airborne division. During that time, Wes was ingrained with a basic principle: leave no one behind. Wes firmly believes that being a Veteran isn't a designation of something done in the past - it's a marker of who a person is. Wes knows Maryland can do better at meeting the needs of our Veterans--and as governor he will honor his pledge to leave no one behind.

WES' VISION:

To better support Veterans, the Moore-Miller administration will:

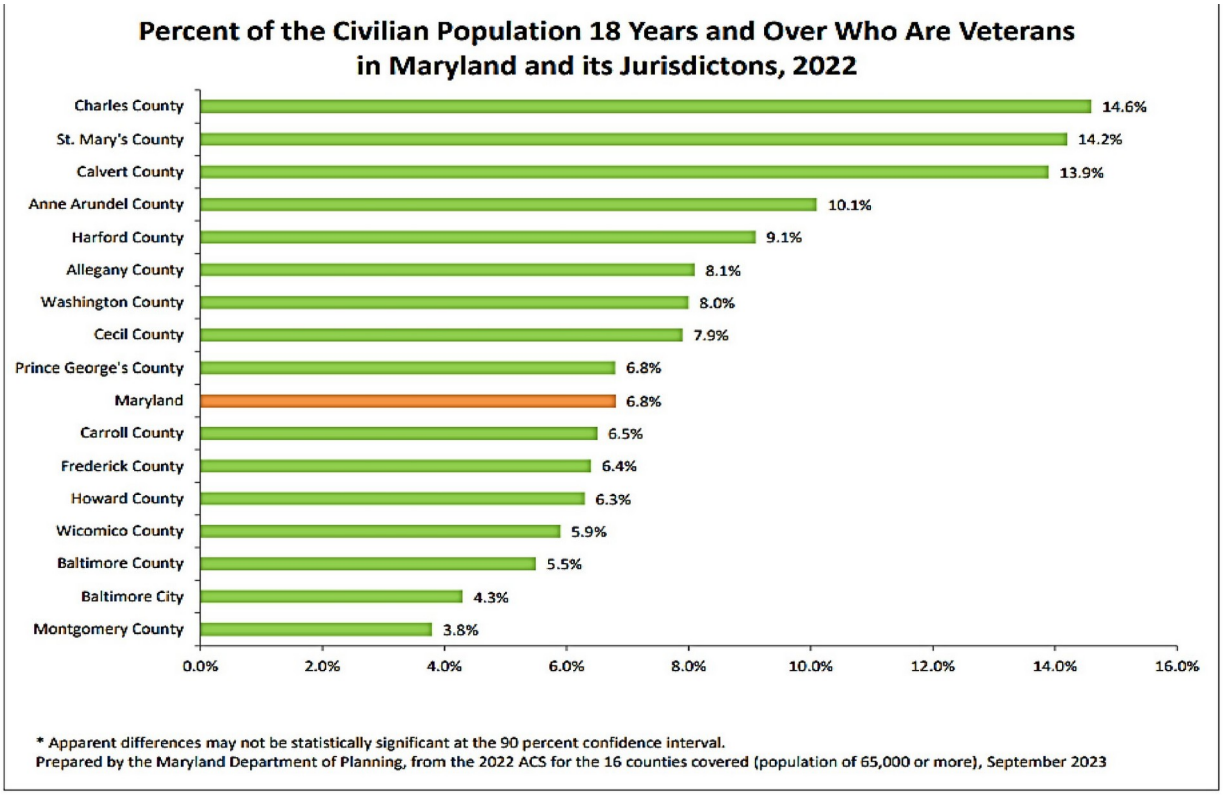
- Lift up Veteran-owned small businesses by reforming our procurement process to make it easier for these businesses and entrepreneurs to win the state's business, eliminating costly and burdensome regulations, and competing for the billions in federal funds available that will improve access to low or no-interest capital.
- Work with the Department of Veterans Affairs to expand and improve quality of care and expedite claims so Veterans can get access to the care they need.

Maryland County Stats

Jurisdiction	Percent of civilian population 18 years and over who are veterans, 2022
Charles County	14.6%
St. Mary's County	14.2%
Calvert County	13.9%
Anne Arundel County	10.1%
Harford County	9.1%
Allegany County	8.1%
Washington County	8.0%
Cecil County	7.9%
Prince George's County	6.8%
Maryland	6.8%
Carroll County	6.5%
Frederick County	6.4%
Howard County	6.3%
Wicomico County	5.9%
Baltimore County	5.5%

Jurisdiction	Percent of civilian population 18 years and over who are veterans, 2022
Baltimore City	4.3%
Montgomery County	3.8%

Apparent differences may not be statistically significant at the 90 percent confidence interval. Prepared by the Maryland Department of Planning, from the 2022 ACS for the 16 counties covered (population of 65,000 or more), September 2023.

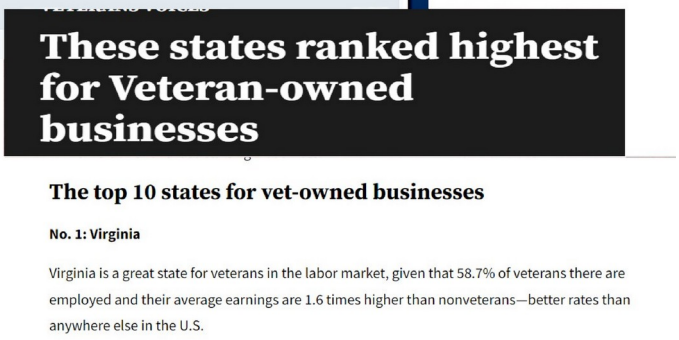


Maryland Federal Stats Certifications



Surrounding State Federal Stat Certifications





It's Okay to Be Different

The History of the VSBE Program

Year	Milestone
2010	The VSBE Program was enacted by the General Assembly
2018	The VSBE Program was moved from under BPW to GOSBA's overview
2021	First VSBE Compliance Manager was hired, Danielle of the VSBE Program
2024	Updates to VSBE Program

Work Counted Toward State Contract Goals

Only the work of a **certified VSBE firm**, performing either directly (prime contractors) or indirectly (subcontractors), can be counted toward the achievement of an established state contract goal

41% Increase in Certified VSBE Vendors

41%

Increase of certified VSBE vendors since July 2023

As of today, we have over 915 VSBEs in the internal database in eMMA

eMaryland Marketplace Advantage (eMMA)

eMaryland Marketplace Advantage (eMMA) is the only platform to verify certified VSBEs

VSBE Liaisons

COMAR 21.11.14.05

The head of each procurement agency shall designate an employee to be a VSBE liaison officer in the administration of that agency's VSBE Program. The VSBE liaison officer shall be a high-level employee reporting directly to a Secretary, Deputy Secretary, or head of a procurement agency.

The VSBE liaison officer is responsible for coordinating agency outreach efforts to the veteran business community, reviewing agency contracting procedures to ensure compliance with this chapter, assisting in the resolution of contracting issues, and for submitting required VSBE Program reports or information.

In FY2023

- Only 9 units met the VSBE 1% statewide goal
- As a state, we finished at .75% of the 1% goal
- 22 units made $0 in awards to VSBEs
- $35.6 Million was made in awards to VSBEs

Math Question

51 total participating units – 22 units made no VSBE awards = 29

29-14= 15

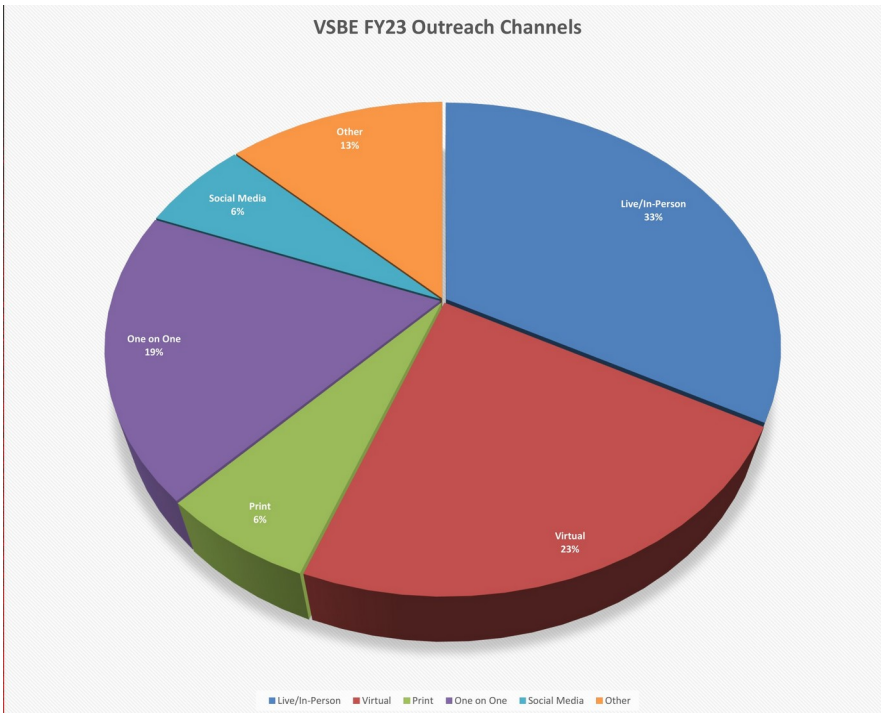
It is going to take effort and participation from all units!!

Outreach

FY2023 Outreach

- Live/In-Person works best
- Virtual is runner up
- One on One takes 3rd place
- Only 6 units reported hosting their own veteran event
- 18 units did not host or participate in ANY veteran specific outreach

VSBE FY23 outreach channel	Percent
Live/In-Person	33%
Virtual	23%
Print	6%
One on One	19%
Social Media	6%
Other	13%



VSBE Outreach 2024 (1 of 2)



VSBE In Person Certification Workshops



VSBE Events 2024



VSBE Outreach 2024 (2 of 2)



First VSBE State Procurement Panel, June 2024



FY2025 Upcoming Outreach

October

- Veteran Small Business Conference w/ Dept. of Labor

November

- Judiciary MBE & VSBE Outreach Event
- National Veteran Small Business Week Celebration
- VSBE T.I.P.S Training
- VSBE Appreciation Breakfast @ Live Casino November 26th

Effective Outreach

- Communicate clearly the objective
- Give enough time to market
- Notify me so we can help advertise it
- If you need or want help, let me know!

(No one understands what your unit procures better than you do!)

Take Aways

- Veteran Small Businesses learn things from one another- its embedded into then from their military experience
- They want MORE!
- “Further breakdown of which contract are best to start in”- which means they want to build past performance you with all, they just need the opportunity!



PRG

Procurement Solicitations (1 of 3)

COMAR 21.11.14.07- Goal Setting Generally.

(1) A procurement agency shall assess the potential for VSBE prime and subcontractor participation in each contract and estimate the amount of participation if any before initiating the procurement.

(2) Some factors which may be used to determine the level of VSBE participation include:

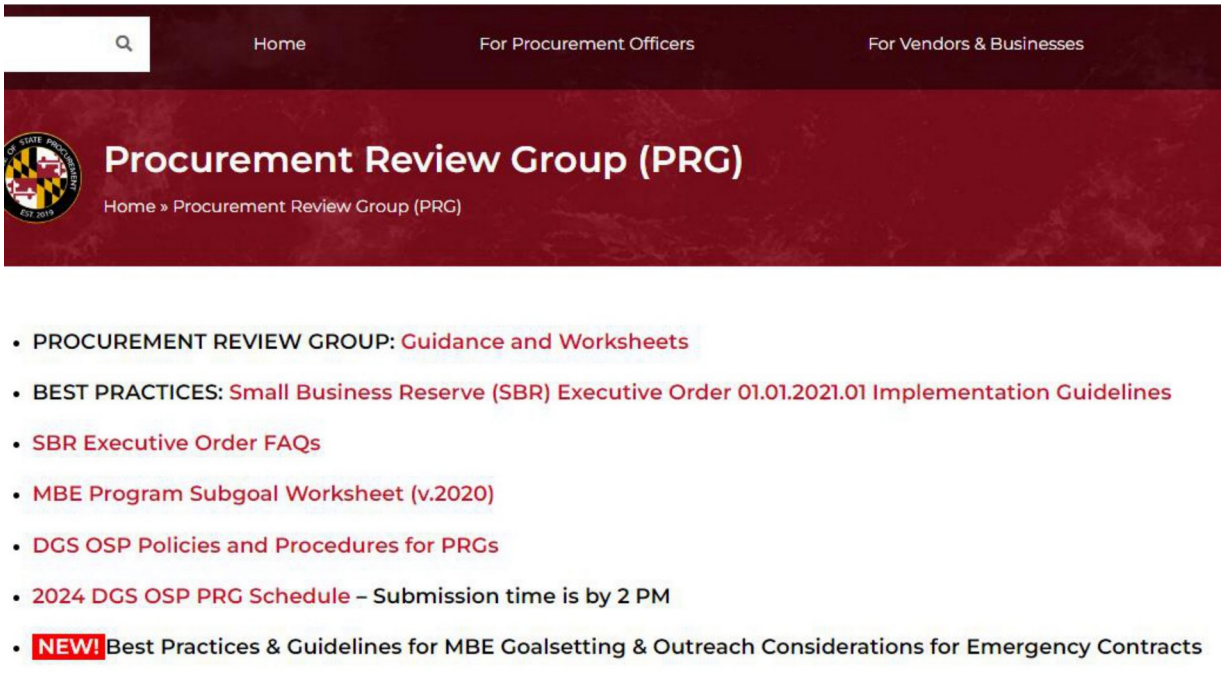
(a) The extent to which direct solicitation at the prime contract level, subcontracting, or a combination of both is determined most likely to result in maximum VSBE participation in the contract;

(b) The number of certified VSBEs listed in the Database in addition to veteran-owned firms identified by the U.S. Small Business Administration and other resources and databases used to identify veteran-owned firms for a particular supply, service, maintenance, construction, construction-related service, architectural service, or engineering service;

(c) The geographical proximity, when relevant, of VSBEs to the location of the work to be performed; and

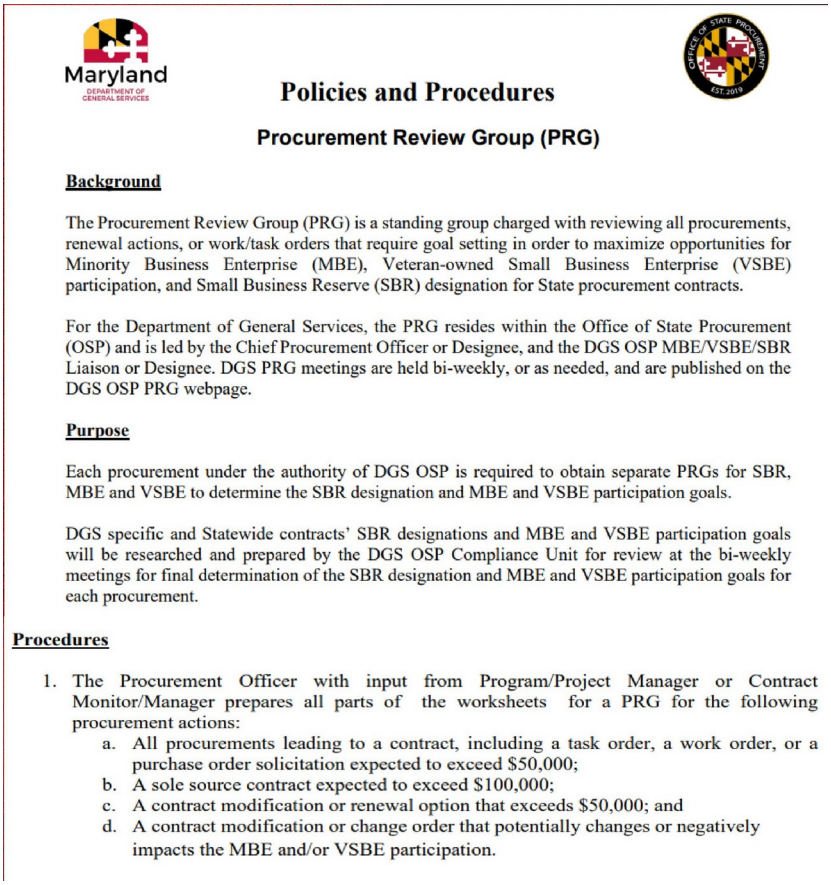
(d) The feasibility of subcontracting opportunities given the nature and extent of the proposed contract.

Procurement Review Group (PRG) Website



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

PRG Policies and Procedures



Maryland
DEPARTMENT OF GENERAL SERVICES

Policies and Procedures

Procurement Review Group (PRG)

Background

The Procurement Review Group (PRG) is a standing group charged with reviewing all procurements, renewal actions, or work/task orders that require goal setting in order to maximize opportunities for Minority Business Enterprise (MBE), Veteran-owned Small Business Enterprise (VSBE) participation, and Small Business Reserve (SBR) designation for State procurement contracts.

For the Department of General Services, the PRG resides within the Office of State Procurement (OSP) and is led by the Chief Procurement Officer or Designee, and the DGS OSP MBE/VSBE/SBR Liaison or Designee. DGS PRG meetings are held bi-weekly, or as needed, and are published on the DGS OSP PRG webpage.

Purpose

Each procurement under the authority of DGS OSP is required to obtain separate PRGs for SBR, MBE and VSBE to determine the SBR designation and MBE and VSBE participation goals.

DGS specific and Statewide contracts' SBR designations and MBE and VSBE participation goals will be researched and prepared by the DGS OSP Compliance Unit for review at the bi-weekly meetings for final determination of the SBR designation and MBE and VSBE participation goals for each procurement.

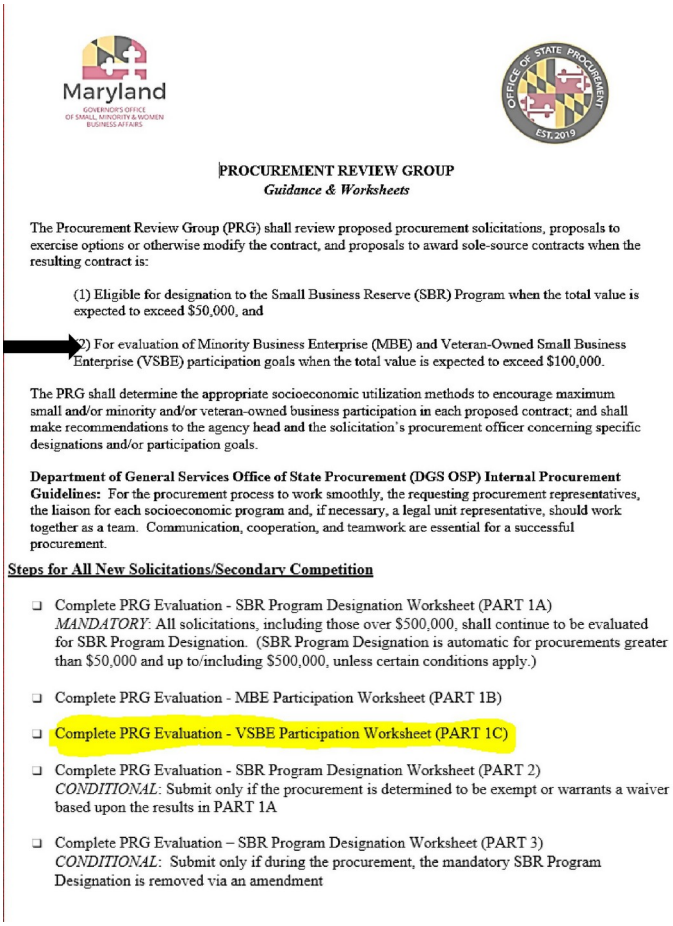
Procedures

1. The Procurement Officer with input from Program/Project Manager or Contract Monitor/Manager prepares all parts of the worksheets for a PRG for the following procurement actions:
   a. All procurements leading to a contract, including a task order, a work order, or a purchase order solicitation expected to exceed $50,000;
   b. A sole source contract expected to exceed $100,000;
   c. A contract modification or renewal option that exceeds $50,000; and
   d. A contract modification or change order that potentially changes or negatively impacts the MBE and/or VSBE participation.

If you are not familiar with the 3-page document, it will truly help with the understanding of how important the PRG is to our socio-economic programs.

https://procurement.maryland.gov/wp-content/uploads/sites/12/2023/05/PP-Procurement-Review-Group-PRG-v5-2023.pdf

PRG Guidance and Worksheets



PROCUREMENT REVIEW GROUP
Guidance & Worksheets

The Procurement Review Group (PRG) shall review proposed procurement solicitations, proposals to exercise options or otherwise modify the contract, and proposals to award sole-source contracts when the resulting contract is:

(1) Eligible for designation to the Small Business Reserve (SBR) Program when the total value is expected to exceed $50,000, and

(2) For evaluation of Minority Business Enterprise (MBE) and Veteran-Owned Small Business Enterprise (VSBE) participation goals when the total value is expected to exceed $100,000.

The PRG shall determine the appropriate socioeconomic utilization methods to encourage maximum small and/or minority and/or veteran-owned business participation in each proposed contract; and shall make recommendations to the agency head and the solicitation's procurement officer concerning specific designations and/or participation goals.

Department of General Services Office of State Procurement (DGS OSP) Internal Procurement Guidelines: For the procurement process to work smoothly, the requesting procurement representatives, the liaison for each socioeconomic program and, if necessary, a legal unit representative, should work together as a team. Communication, cooperation, and teamwork are essential for a successful procurement.

Steps for All New Solicitations/Secondary Competition

- ❑ Complete PRG Evaluation - SBR Program Designation Worksheet (PART 1A)
  MANDATORY: All solicitations, including those over $500,000, shall continue to be evaluated for SBR Program Designation. (SBR Program Designation is automatic for procurements greater than $50,000 and up to/including $500,000, unless certain conditions apply.)
- ❑ Complete PRG Evaluation - MBE Participation Worksheet (PART 1B)
- ❑ Complete PRG Evaluation - VSBE Participation Worksheet (PART 1C)
- ❑ Complete PRG Evaluation - SBR Program Designation Worksheet (PART 2)
  CONDITIONAL: Submit only if the procurement is determined to be exempt or warrants a waiver based upon the results in PART 1A
- ❑ Complete PRG Evaluation – SBR Program Designation Worksheet (PART 3)
  CONDITIONAL: Submit only if during the procurement, the mandatory SBR Program Designation is removed via an amendment

Word Document is downloaded

ALL opportunities over $100,000+ are to be evaluated for VSBE participation goals during the PRG process

PRG VSBE Participation Worksheets

VSBE Participation Worksheet (PART 1C)
PRG Evaluation to Establish VSBE Participation and Potential Subcontracting Opportunities for Solicitation #: _____ Procurement Contract Title: _____

As provided by Title 21.11.14 and BPW Advisory 2012-1, the Veteran-Owned Small business Enterprise (VSBE) Subcontracting Documentation will establish a process and structure for reviewing contract solicitations, proposed sole-source contracts, and contract renewal options to maximize opportunities for VSBEs to participate in State Procurement Contracts.

Opportunity Review or Analysis Question Area	Determination
The extent to which direct solicitation, subcontracting, or a combination will determined most likely to result in maximum VSBE participation in contract.	
Are VSBEs available to directly perform contract at the prime contract level?	
Does the number of verified VSBEs listed in the directory or otherwise identified for a particular service, supply or maintenance activity reasonably assure maximum opportunities for VSBEs to obtain contracts at that level?	
Does the number of verified VSBEs potentially-available for the work components of the contract make the VSBE subcontract goals attainable?	
Is geographical proximity of verified VSBEs to the work location a factor?	
Identify the specific work categories within the scope of the procurement appropriate for subcontracting and number of verified VSBE providers for each work component?	
Are verified VSBE subcontracting opportunities feasible?	
Are the structure, specifications, and requirements of the solicitation designed to ensure that they do not unreasonably limit or inhibit participation by verified VSBEs? ***Inhibiting factors may include unnecessary or prohibitive bonding requirements, restrictive specifications, unnecessary or unreasonable performance parameters, and unnecessary or unreasonable experience requirements. General policies for developing specifications are set forth in COMAR 21.04.01.***	
Is it feasible to divide a complex procurement into separate procurements consistent with VSBE and small business capacity?	
Sole-source contracts: Are there work components that can reasonably be subcontracted to VSBEs and other small businesses?	
Renewal options: What are the benefits of exercising the option versus re-competing the contract? Consider such factors as past performance, potential for cost reduction, and current opportunities for small business or VSBE participation.	

Procurement Review Group (PRG)
VSBE Participation Worksheet

SECTION 1 – PRG REVIEW GROUP

Requesting Agency:			
MBE Liaison Officer:		Date:	
Program Manager / Contract Monitor:		Date:	
Procurement Officer:		Date:	
Procurement Director:		Date:	

SECTION 2 – SOLICITATION INFORMATION

IFB/RFP Number:			
IFB/RFP Title:			
Brief Description of the IFB/RFP			
IFB/RFP Contract Term		Options (Enter amount)	
Is there a Current Contract?	Yes or No	Current VSBE Contract Goal	

SECTION 3 – SUBCONTRACT OPPORTUNITIES IN CURRENT CONTRACT

VSBE Name	DUNS #	Description of Work	VSBE Goal	No. Years	Dollar Amount
TOTAL SUBCONTRACT AMOUNT					
TOTAL CONTRACT AMOUNT					

Has the Prime met or exceeded the current VSBE goal? Met ☐ Exceeded ☐ (If neither Explain)

SECTION 4 – POTENTIAL SUBCONTRACT OPPORTUNITIES FOR NEW IFB/RFP

Subcontract Area	No. Verified VSBEs in this area	Est. Subcontracting Dollar Amount	Est. Percent	No. Years	Contract Amount
TOTAL ESTIMATED SUBCONTRACT AMOUNT					
TOTAL ESTIMATED CONTRACT AMOUNT					
CALCULATED VSBE GOAL (Total Subcontract Amount/Estimated Contract Amount)					

SECTION 5 – SUMMARY FOR VSBE PARTICIPATION GOAL

RECOMMENDED VSBE GOAL		ESTIMATED VSBE AMOUNT	

VSBE Research Worksheet and Code Searches

VSBE Research for Project No. _____

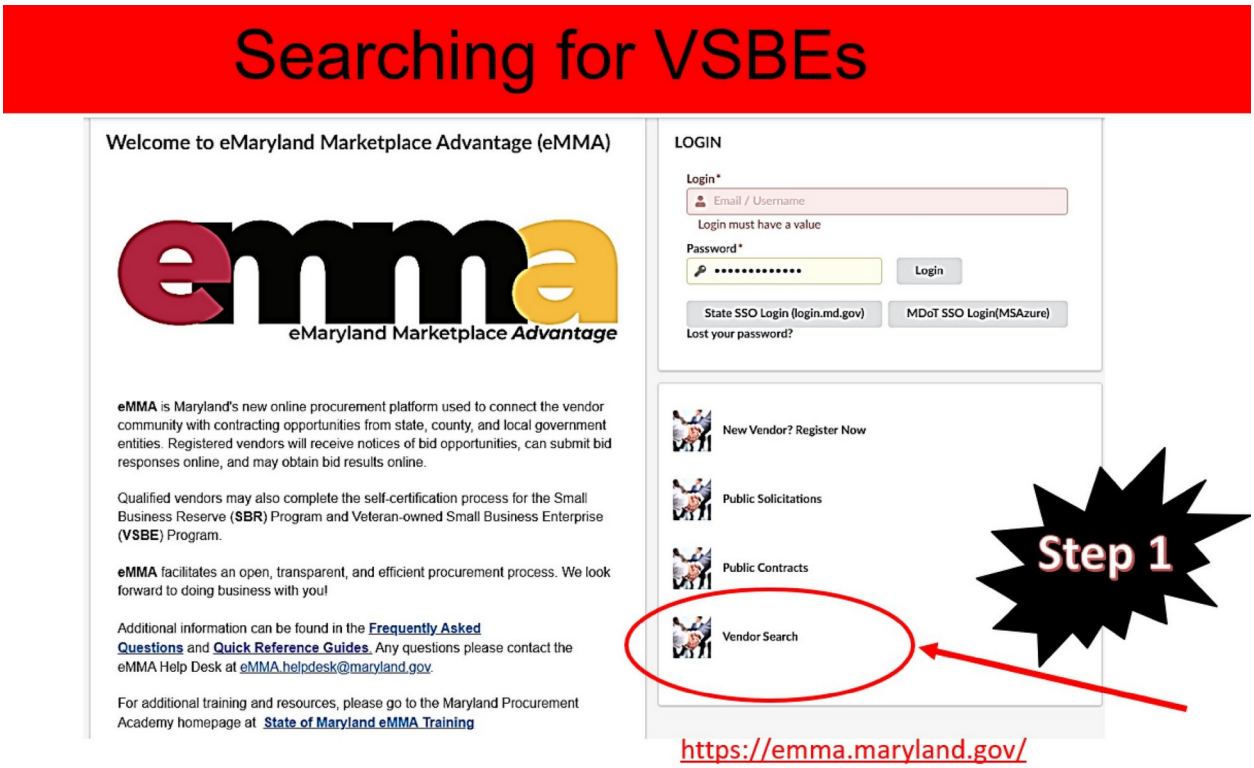
Results of Search by UNSPSC, NAICS, NIGP or other Product/Commodity Codes

Product Code	Description		# of VSBEs in eMMA Directory or other Database/Resource

- UNSPSC= eMMA
- NAICS= eMMA or federal
- Commodity= eMMA

Searching for VSBEs

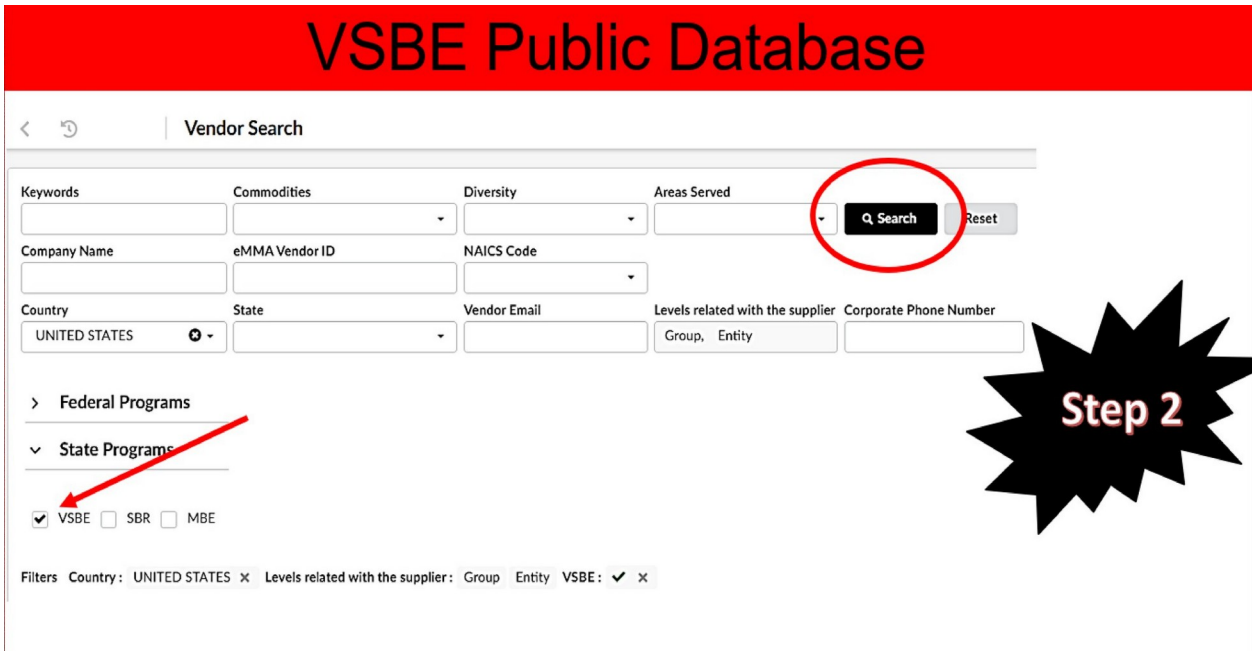
Step 1: Open eMMA and select Vendor Search.



https://emma.maryland.gov/

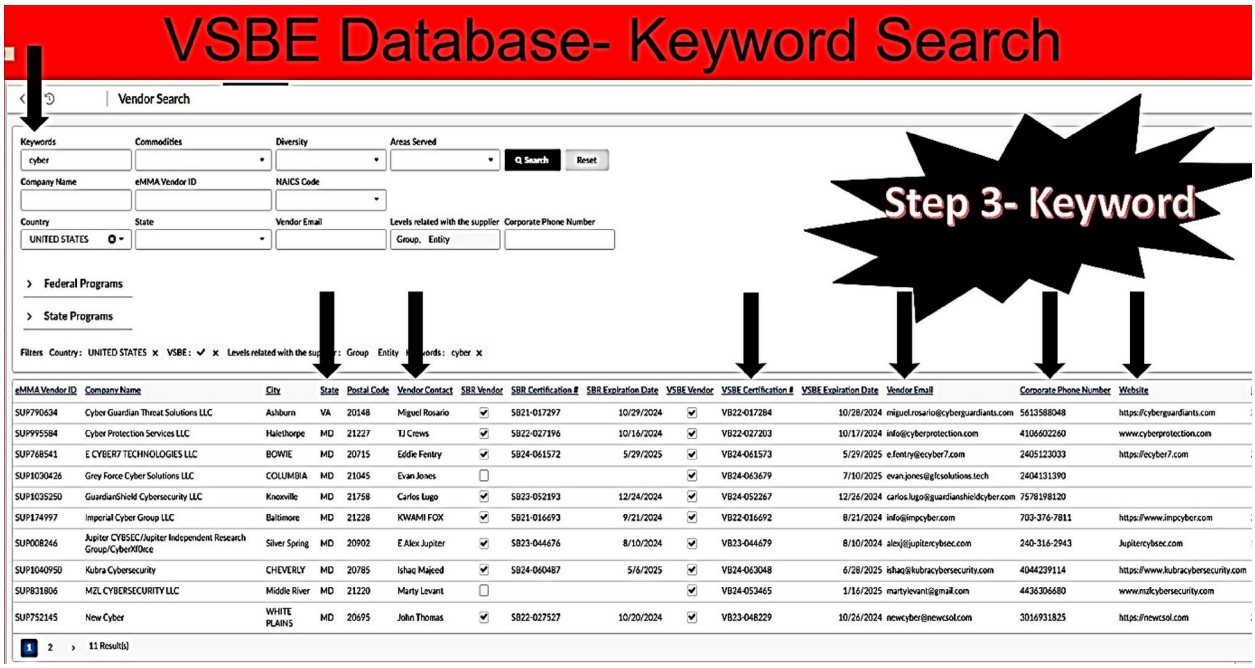
VSBE Public Database

Step 2: On the Vendor Search page, expand State Programs and check VSBE, then select Search.



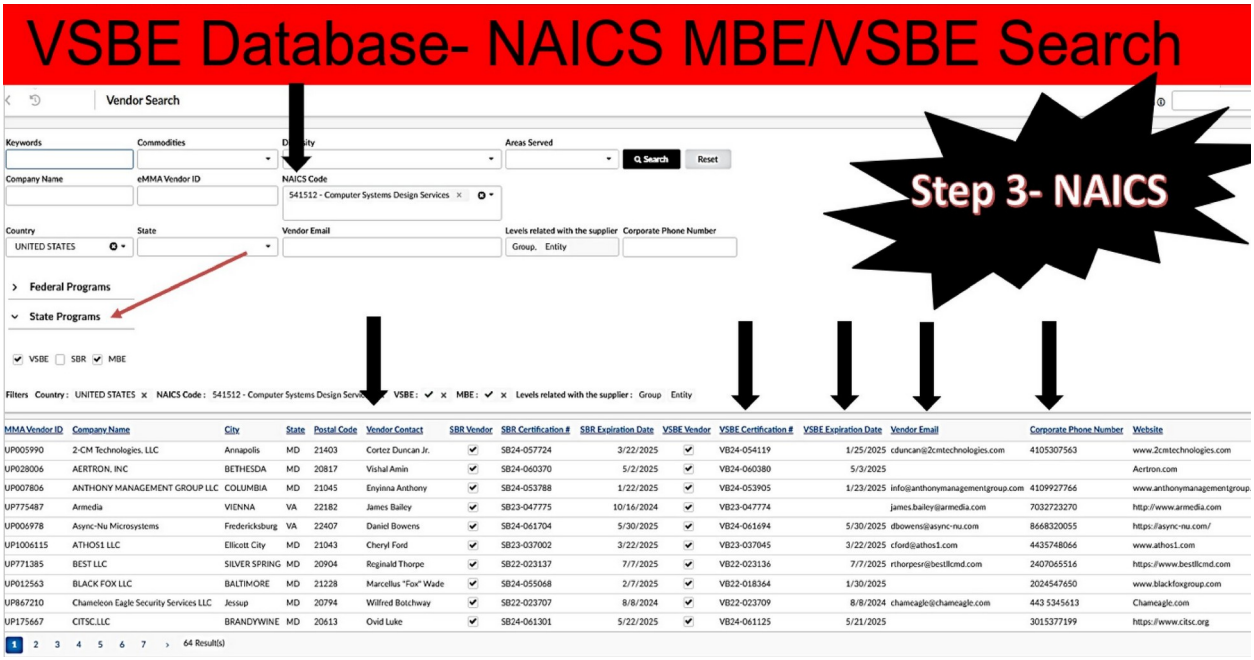
VSBE Database - Keyword Search

Step 3 (Keyword): Enter a keyword to search.



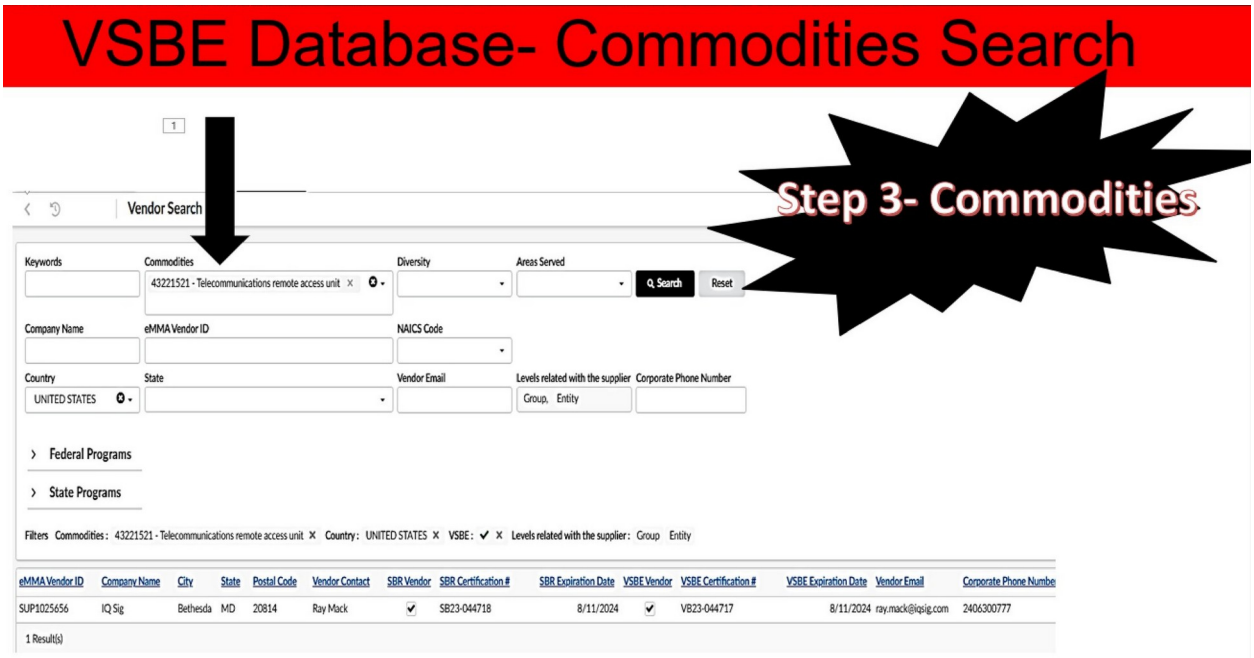
VSBE Database - NAICS MBE/VSBE Search

Step 3 (NAICS): Enter a NAICS code to search.

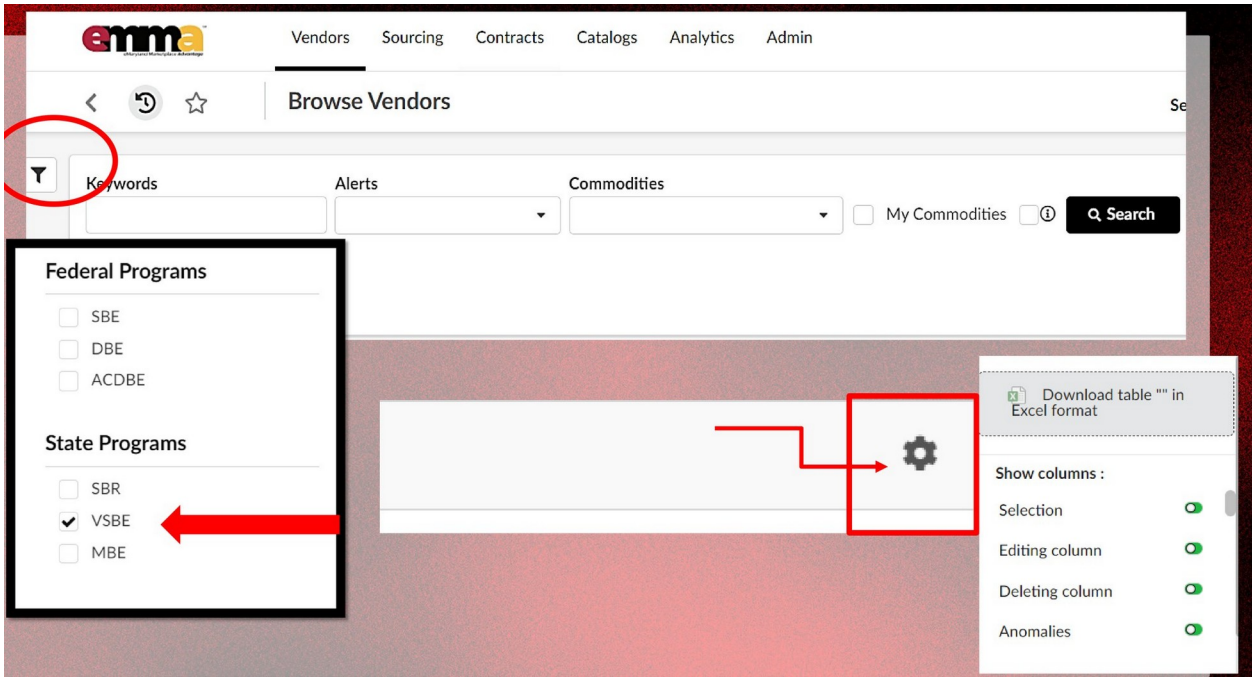


VSBE Database - Commodities Search

Step 3 (Commodities): Select a commodity code to search.



Internal VSBE Database Search



SBA Veteran Small Business Certification (VetCert) Search



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

SBA VetCert Search Results



Best Practices

Procurement Solicitations (2 of 3)

COMAR 21.11.14.07 - E. Direct Solicitation.

As part of the solicitation process being employed for the business community in general, and in addition to the public notice requirements of COMAR 21.05.02.04 and 21.05.03.02B, a procurement agency shall send a copy of the solicitation or notice of the solicitation, or both, to a sufficient number of VSBEs listed in the Database, as determined by the procurement officer, as is likely to result in VSBE responses to the solicitation.

Procurement Solicitations (3 of 3)

COMAR 21.11.14.07 - G. Prebid and Preproposal Conferences.

When prebid or preproposal conferences are held, the procurement agency shall explain the VSBE subcontracting goal if applicable, the VSBE provisions of the solicitation, the documentation required, and its relationship to the determinations that will be made in connection with the evaluation process.

Procurement Agency Responsibilities

COMAR 21.11.14.04

E. Before awarding a contract that includes a VSBE goal, the procurement officer shall use the Database to confirm that the VSBE vendor named to fulfill an established VSBE contract goal is certified by the Governor's Office of Small, Minority & Women Business Affairs (GOSBA).

VSBE Best Practices

- Always verify the certified VSBEs in eMMA
- VSBE Liaisons please make sure to have Admin eMMA access- allows downloadable excel file
- Use the different types of searches because it yields different results with each type
- Use and follow the PRG process
- Direct Solicit
- Have Prebid meetings

VSBE Compliance

Photo credit: This Photo by Unknown Author is licensed under CC BY-SA. Sources: Photo by Unknown Author and CC BY-SA 3.0 license.

VSBE Compliance (continued)

VSBE COMAR 21.11.14.11

It is the responsibility of the procurement unit to :

- To ensure compliance with VSBE subcontract participation goals, the procurement agency shall verify that the VSBEs listed in the participation schedule are actually performing work and receiving compensation as set forth in the schedule.

VSBE Compliance Most Commonly Asked Questions

1. If a solicitation contains an MBE goal and a VSBE goal, participation by a subcontractor dually-certified as an MBE and a VSBE may be counted toward meeting both the MBE and VSBE contract goals to the extent its participation meets the cumulative but distinct MBE and VSBE contract goals, or portions thereof that it is committed to perform. Example: If the solicitation contains a 25 percent MBE goal and a 5 percent VSBE goal, the dually certified subcontractor shall perform 30 percent of the contract to obtain both goals.
2. Counting Prime Participation Toward Overall and Contract Goals.

   (1) A procurement agency may count a prime contractor dually-certified as an MBE and a VSBE toward the agency's overall VSBE and MBE goals.

   (2) A procurement agency may count the distinct, clearly defined portion of the work of the contract that a VSBE certified prime performs with its own work force toward meeting up to 100 percent of the contract's VSBE goal.
3. A certified VSBE shall have certified status in the Database at the time the contract is awarded in order for its participation to be counted toward the VSBE contract goal. All payments made shall be counted toward the VSBE goal under a contract entered into when the VSBE was certified.

VSBE Waivers

VSBE COMAR 21.11.14.09

When a VSBE Waiver is granted, the following must occur per COMAR:

- A COPY SHALL BE KEPT WITH THE VSBE LIAISON IN THAT UNIT
- A COPY SHALL BE SENT TO GOSBA (Danielle)

Granted VSBE Waivers need to be emailed to: VSBE.GOSBA@maryland.gov

MBE & VSBE Goal Waiver Guidance

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

OFFICE OF STATE PROCUREMENT
EST. 2019

MBE & VSBE Goal Waiver Guidance
Good Faith Effort Review & Determination

I. OVERVIEW

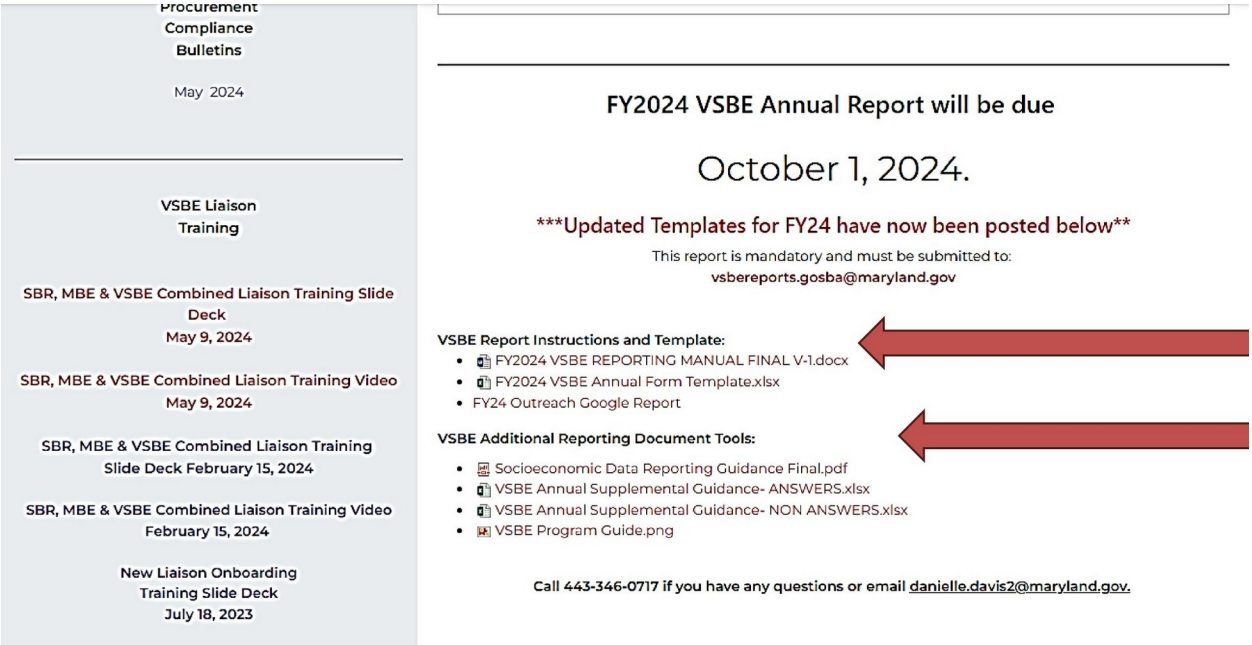
The State of Maryland's procurement processes allow Bidders/Offerors to request a waiver, partial or in full, if they have determined that they are unable to meet a subcontracting participation goal established for Minority Business Enterprise (MBE), Veteran-Owned Minority Business Enterprise (VSBE), or both.

Bidders/Offers who make a waiver request must submit the appropriate forms with the bid/proposal package and fully document Good Faith Efforts to meet the established participation goal(s). Waiver Guidance along with the applicable forms, is provided in the solicitation package.
Minority Business Enterprise (MBE) Forms – *Attachment D Series*
Veteran-Owned Minority Business Enterprise (VSBE) Forms - *Attachment E Series*

https://procurement.maryland.gov/wp-content/uploads/sites/12/2022/11/BP-MBE_VSBE-Waiver-Guidance-v1-10.17.2022.pdf

Reporting

VSBE ToolKit



Procurement
Compliance
Bulletins

May 2024

VSBE Liaison
Training

SBR, MBE & VSBE Combined Liaison Training Slide Deck
May 9, 2024

SBR, MBE & VSBE Combined Liaison Training Video
May 9, 2024

SBR, MBE & VSBE Combined Liaison Training Slide Deck February 15, 2024

SBR, MBE & VSBE Combined Liaison Training Video
February 15, 2024

New Liaison Onboarding
Training Slide Deck
July 18, 2023

FY2024 VSBE Annual Report will be due

October 1, 2024.

***Updated Templates for FY24 have now been posted below**

This report is mandatory and must be submitted to:
vsbereports.gosba@maryland.gov

VSBE Report Instructions and Template:

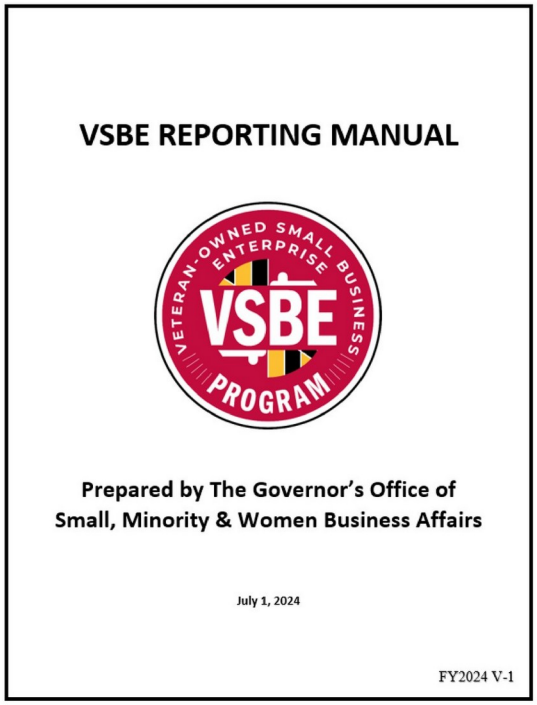
- FY2024 VSBE REPORTING MANUAL FINAL V-1.docx
- FY2024 VSBE Annual Form Template.xlsx
- FY24 Outreach Google Report

VSBE Additional Reporting Document Tools:

- Socioeconomic Data Reporting Guidance Final.pdf
- VSBE Annual Supplemental Guidance- ANSWERS.xlsx
- VSBE Annual Supplemental Guidance- NON ANSWERS.xlsx
- VSBE Program Guide.png

Call 443-346-0717 if you have any questions or email danielle.davis2@maryland.gov.

VSBE Reporting Manual



VSBE REPORTING MANUAL

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

July 1, 2024

FY2024 V-1

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VSBE Supporting Backup Data - Answers

1. PCHL 709 (PO/BPO Change Orders from contracts awarded in prior fiscal years) WITH NEW Vet flag
2. PCHL 710 (Contract Awards Detail) with Vet Flag
3. PCHL 717 (MBE/VSBE Prime Payments by Direct Voucher; no BPO/PO) with Vet Flag
4. PCHL 718 (MBE/VSBE Prime Voucher Payments made from BPO/PO) with Vet Flag
5. PCHL 719 (MBE/VSBE Subcontractor Payments) with Vet Flag
6. PCHL 720 (MBE/VSBE Subcontractor Awards) run by award dates with Vet Flag
7. PCHL 721 or Internal Agency/Department (MBE/VSBE Credit Card/P-Card Purchases) no Vet Flag, but has Vet column on report

VSBE Supporting Backup Data - Non Answers

1. PO/BPO Change Orders from contracts awarded in prior fiscal years with VSBE awards
2. All Contract Awards Detail with VSBE awards
3. All Prime Payments by Direct Voucher; no BPO/PO with VSBE payments
4. All Prime Voucher Payments made from BPO/PO with VSBE payments
5. All Subcontractor Payments with VSBE payments
6. All Subcontractor Awards with VSBE awards
7. All Internal Agency/Department Credit Card/P-Card Purchases with VSBE Payments

Socioeconomic Data Reporting Guidance



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.

Reporting Best Practices and Scrubbing Data

Reporting Best Practices

- Pull quarterly and annual report data in a timely manner to meet the due dates
- Ensure quality assurance and thoroughly review data for errors and omission (ex. system errors, clerical errors)
- Keep two datasets:
  - (1) raw - preserves the data integrity
  - (2) scrubbed - normalizes and cleanses the data
- Collaborate with all necessary internal stakeholders to ensure the report has been verified for data quality assurance prior to final submission to GOSBA
- Identify statewide and delegated contracts to ensure proper counting
- Collaborate with staff members that enter codes in FMIS for clarification data input procedures
  - Some procurement units have their own Agency object code (AOBJ) Crosswalk which rolls up to Comptroller Object Codes.

Last Updated: July 1, 2024

Scrubbing Data

The report preparer is expected to scrub the raw data to correct or remove errors, redundancies, incomplete data, or data that should be excluded from participation data.

1. Pull appropriate data reports from the procurement and accounting system of record. (i.e. ANSWERS, iFMIS, PeopleSoft)
2. Organize necessary data by program (Specific instructions are available in each program's reporting manual found in the reporting toolkits: SBR Reporting Toolkit, MBE Reporting Toolkit, and VSBE Reporting Toolkit)
3. Carefully review all Direct Vouchers and Prime Vouchers as inaccurate reporting will affect the data output.
   - Direct Vouchers
     - One time payments, primarily Small Procurements Cat I & II
     - Reported as both an award and a payment
   - Prime Vouchers
     - Made from a BPO/PO
     - Reported as a payment only
4. Cross reference this guidance for each socioeconomic program award and payment data report to ensure the necessary line items are reported accurately.
   a. *ADPICS Additional Elements* provides reporting guidance by contract type, procurement method, category of work, and award authority. https://bpw.maryland.gov/Documents/1998%202%20Attachment.pdf
   b. *Procurement Exemptions*, as outlined in COMAR, define both overarching procurement exemptions and agency specific exemptions. COMAR 21.01.03.01
   c. *Comptroller Object Codes* are used to identify reportable and non-reportable data line items. (See Page 4 for greater detail)
      1. A.1 Standard Rates and Schedules by Comptroller Subobject
      2. Appendix G - Expenditure Objects and Definitions
   d. *BPW Advisory 2005-1 Small Business Reserve Program,* as outlined in the BPW advisory, which establishes the process for procurement units to adhere to the SBR program. https://bpw.maryland.gov/Pages/adv-2005-1.aspx

VSBE Annual Report (1 of 3)

VSBE Annual Data Collection Instructions:

The VSBE Annual Form to collect both award and payment data made to VSBE Prime and VSBE Subcontractors. The Annual form on the second tab is broken into 2 parts, section 1 is for all award data and then specific VSBE award data. While section 2 is for all payment data and then specific VSBE payment data made to VSBE primes and VSBE subcontractors with separate tabs labeled PRIMES and SUBS to assist in this process.

In order to complete these sections, you must have run all required reports outlined in the VSBE Reporting Manual, and scrubbed the data accordingly. You may also utilize the VSBE Supplemental Reporting Guidance as assistance.

Submission deadline: October 1,2024

Reports are required to be submitted via email to: **vsbereports.gosba@maryland.gov**

Annual Form data should include ALL of the following:

Section 1-

VSBE Award data should include Total Qty and Total $:

ALL awards to made to Primes
ALL awards to VSBE Primes
ALL awards to VSBE Subcontractors

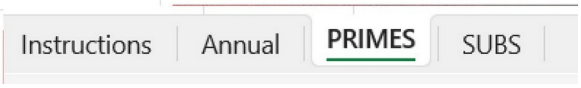
Section 2-

VSBE Payment data should include:

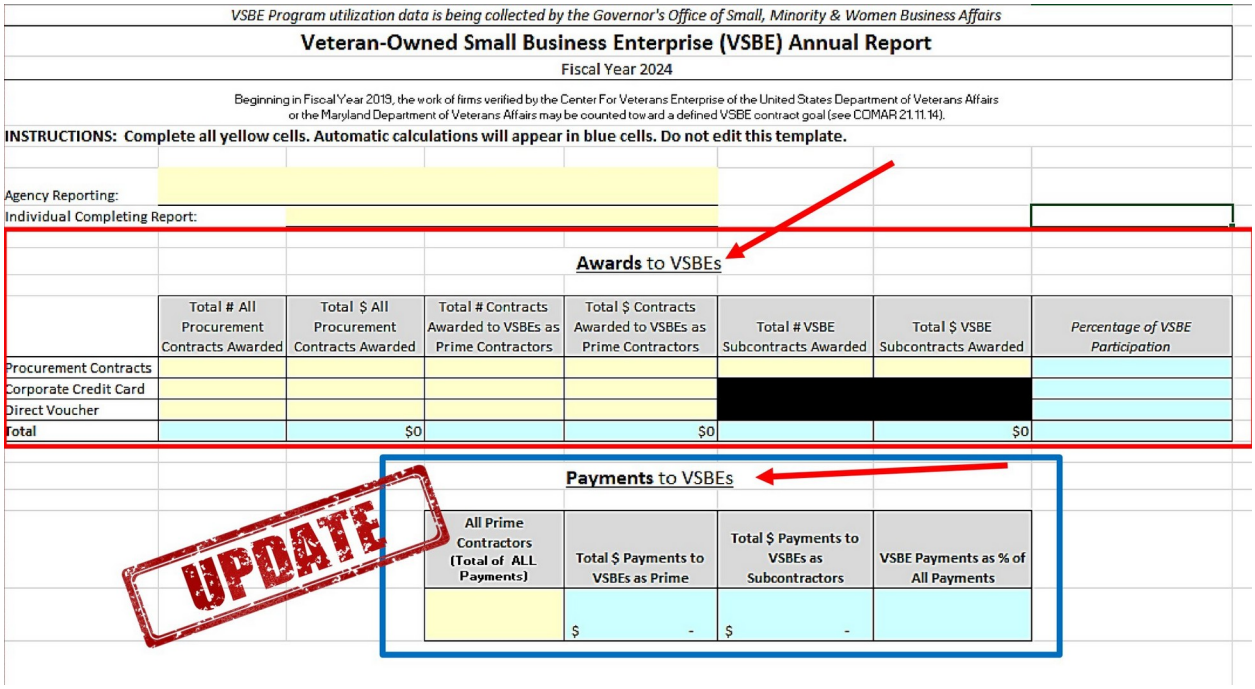
Total ALL payments $ to made to both Prime and Subcontracts
ALL payments to VSBE Primes data
ALL payments to VSBE Subcontractors

The worksheet must contain two sheets with the following names:

Primes- Payments made to VSBE Primes
Subs- Payments made to VSBE Subcontractors



VSBE Annual Report (2 of 3)



VSBE Program utilization data is being collected by the Governor's Office of Small, Minority & Women Business Affairs

Veteran-Owned Small Business Enterprise (VSBE) Annual 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 yellow cells. Automatic calculations will appear in blue cells. Do not edit this template.

Agency Reporting:

Individual Completing Report:

Awards to VSBEs

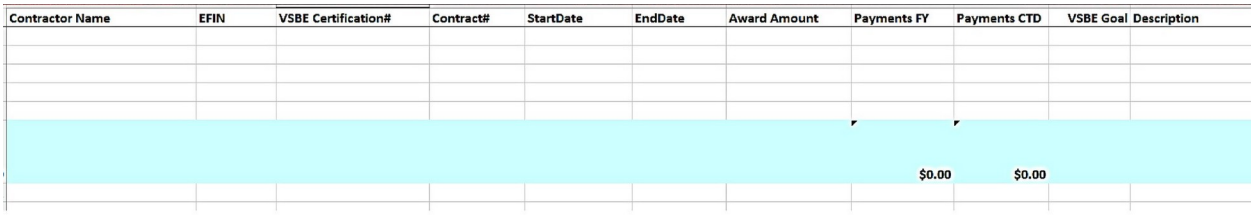
	Total # All Procurement Contracts Awarded	Total $ All Procurement Contracts Awarded	Total # Contracts Awarded to VSBEs as Prime Contractors	Total $ Contracts Awarded to VSBEs as Prime Contractors	Total # VSBE Subcontracts Awarded	Total $ VSBE Subcontracts Awarded	*Percentage of VSBE Participation*
Procurement Contracts							
Corporate Credit Card							
Direct Voucher							
Total		$0		$0		$0	

UPDATE

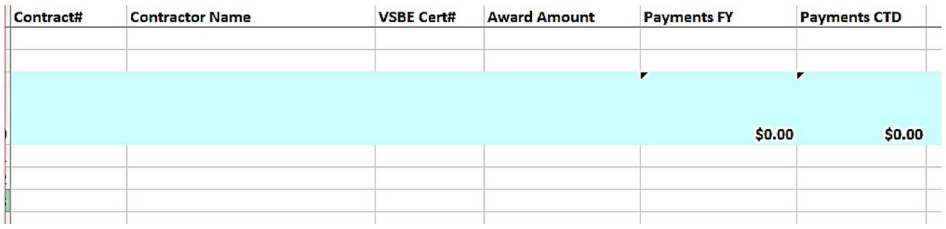
Payments to VSBEs

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
	$ -	$ -	

VSBE Annual Report (3 of 3)

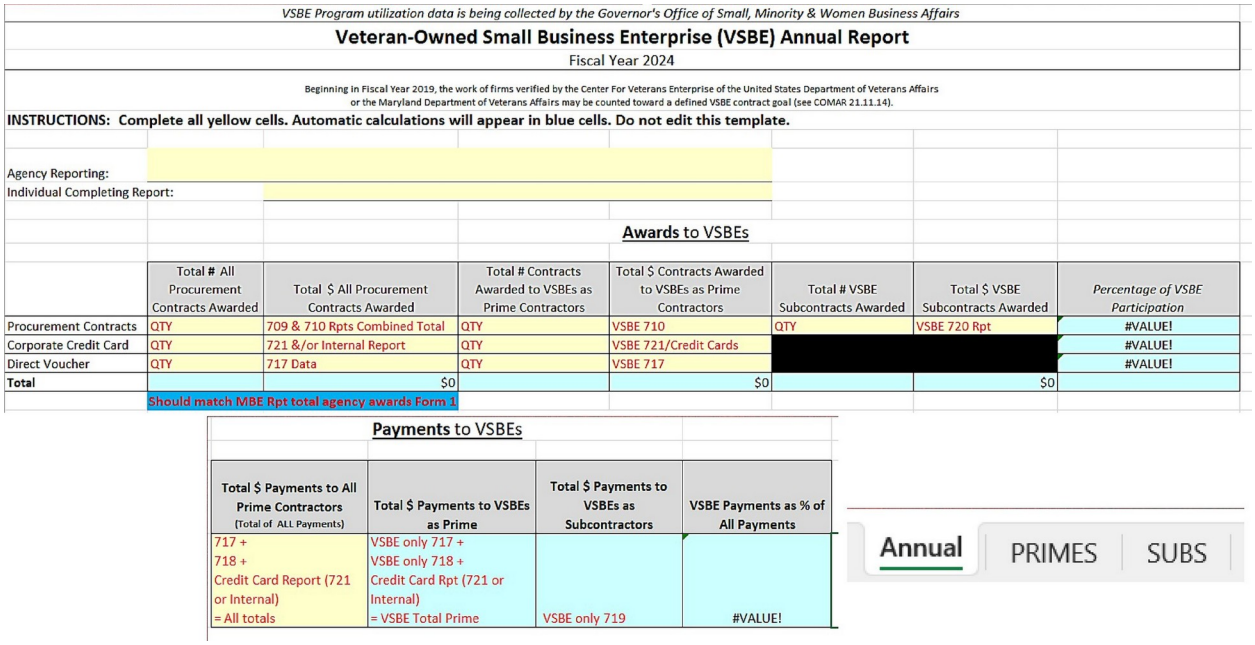


Contractor Name	EFIN	VSBE Certification#	Contract#	StartDate	EndDate	Award Amount	Payments FY	Payments CTD	VSBE Goal	Description
							$0.00	$0.00		



Contract#	Contractor Name	VSBE Cert#	Award Amount	Payments FY	Payments CTD
				$0.00	$0.00

VSBE Annual Report - Answers



VSBE Program utilization data is being collected by the Governor's Office of Small, Minority & Women Business Affairs

Veteran-Owned Small Business Enterprise (VSBE) Annual 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 yellow 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	*Percentage of VSBE Participation*
Procurement Contracts	QTY	709 & 710 Rpts Combined Total	QTY	VSBE 710	QTY	VSBE 720 Rpt	#VALUE!
Corporate Credit Card	QTY	721 &/or Internal Report	QTY	VSBE 721/Credit Cards			#VALUE!
Direct Voucher	QTY	717 Data	QTY	VSBE 717			#VALUE!
Total		$0		$0		$0	

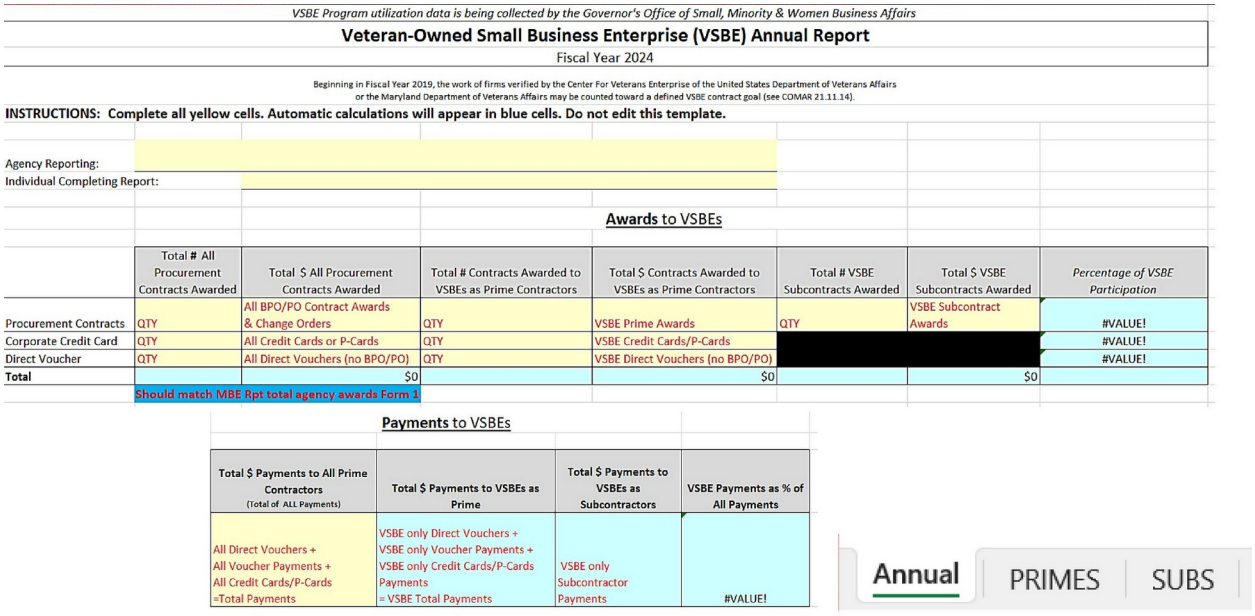
Should match MBE Rpt total agency awards Form 1

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!

Annual | PRIMES | SUBS

VSBE Annual Report - Non Answers



VSBE Program utilization data is being collected by the Governor's Office of Small, Minority & Women Business Affairs

Veteran-Owned Small Business Enterprise (VSBE) Annual 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 yellow 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	*Percentage of VSBE Participation*
Procurement Contracts	QTY	All BPO/PO Contract Awards & Change Orders	QTY	VSBE Prime Awards	QTY	VSBE Subcontract Awards	#VALUE!
Corporate Credit Card	QTY	All Credit Cards or P-Cards	QTY	VSBE Credit Cards/P-Cards			#VALUE!
Direct Voucher	QTY	All Direct Vouchers (no BPO/PO)	QTY	VSBE Direct Vouchers (no BPO/PO)			#VALUE!
Total		$0		$0		$0	

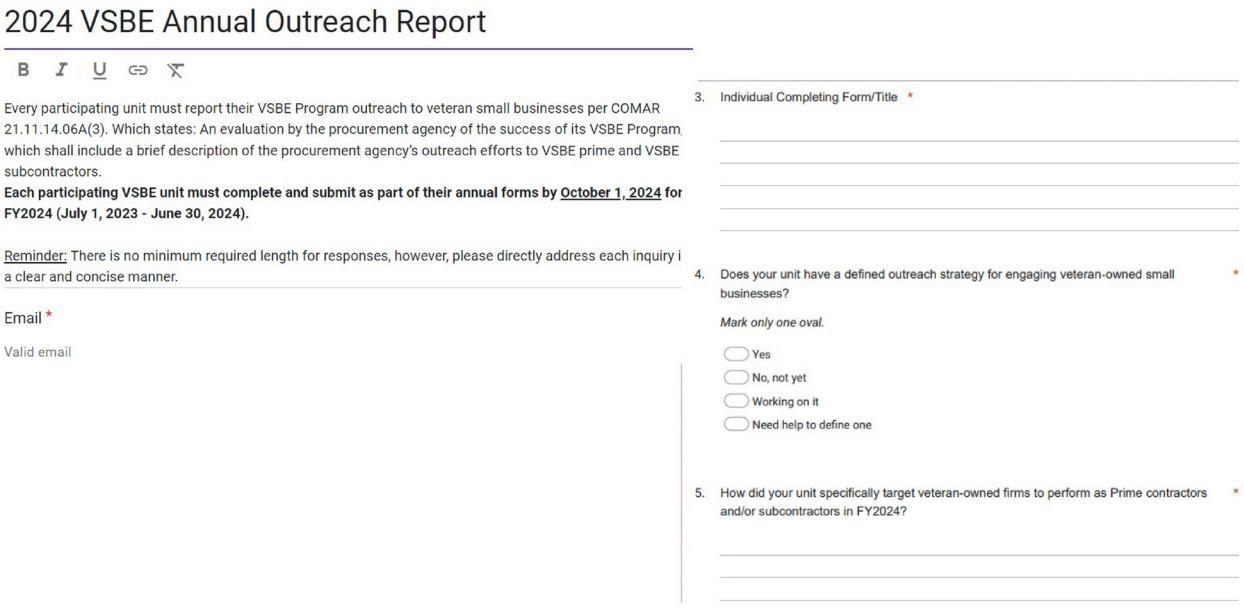
Should match MBE Rpt total agency awards Form 1

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
All Direct Vouchers + All Voucher Payments + All Credit Cards/P-Cards =Total Payments	VSBE only Direct Vouchers + VSBE only Voucher Payments + VSBE only Credit Cards/P-Cards Payments = VSBE Total Payments	VSBE only Subcontractor Payments	#VALUE!

Annual | PRIMES | SUBS

VSBE Annual Outreach Report (1 of 2)



2024 VSBE Annual Outreach Report

Every participating unit must report their VSBE Program outreach to veteran small businesses per COMAR 21.11.14.06A(3). Which states: An evaluation by the procurement agency of the success of its VSBE Program, which shall include a brief description of the procurement agency's outreach efforts to VSBE prime and VSBE subcontractors.

Each participating VSBE unit must complete and submit as part of their annual forms by October 1, 2024 for FY2024 (July 1, 2023 - June 30, 2024).

Reminder: There is no minimum required length for responses, however, please directly address each inquiry i a clear and concise manner.

Email *

Valid email

3. Individual Completing Form/Title *

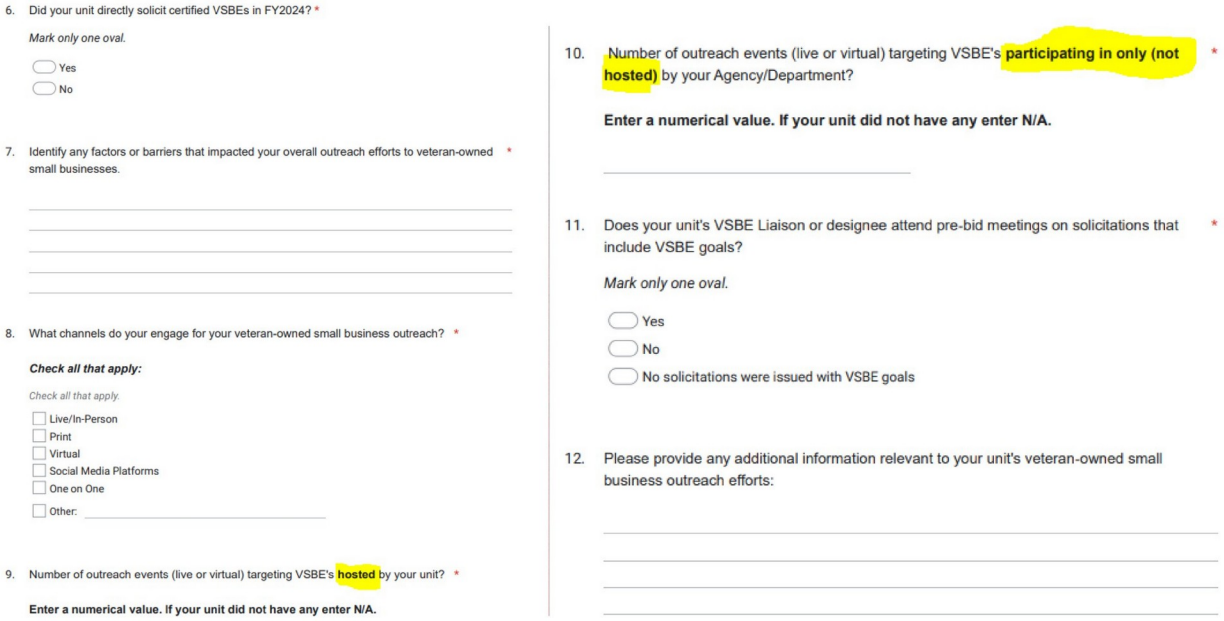
4. Does your unit have a defined outreach strategy for engaging veteran-owned small businesses? *

Mark only one oval.

- Yes
- No, not yet
- Working on it
- Need help to define one

5. How did your unit specifically target veteran-owned firms to perform as Prime contractors and/or subcontractors in FY2024? *

VSBE Annual Outreach Report (2 of 2)



6. Did your unit directly solicit certified VSBEs in FY2024? *

Mark only one oval.

- Yes
- No

7. Identify any factors or barriers that impacted your overall outreach efforts to veteran-owned small businesses. *

8. What channels do your engage for your veteran-owned small business outreach? *

Check all that apply:

Check all that apply.

- Live/In-Person
- Print
- Virtual
- Social Media Platforms
- One on One
- Other:

9. Number of outreach events (live or virtual) targeting VSBE's **hosted** by your unit? *

Enter a numerical value. If your unit did not have any enter N/A.

10. Number of outreach events (live or virtual) targeting VSBE's **participating in only (not hosted)** by your Agency/Department? *

Enter a numerical value. If your unit did not have any enter N/A.

11. Does your unit's VSBE Liaison or designee attend pre-bid meetings on solicitations that include VSBE goals? *

Mark only one oval.

- Yes
- No
- No solicitations were issued with VSBE goals

12. Please provide any additional information relevant to your unit's veteran-owned small business outreach efforts:

Reporting Checklist

- Gather All parties necessary
- VSBE Annual Report Template
- Raw VSBE Data
- Scrubbed All Procurement data
- All Scrubbed VSBE Supporting Data

- Ran all “Veteran firms” against eMMA
- Complete Outreach Report

Note: The same total procurement data, reported on MBE Form 1, should match total procurements on VSBE Annual Report Form

Send reports to vsbereports.gosba@maryland.gov

Don’t miss the Deadline

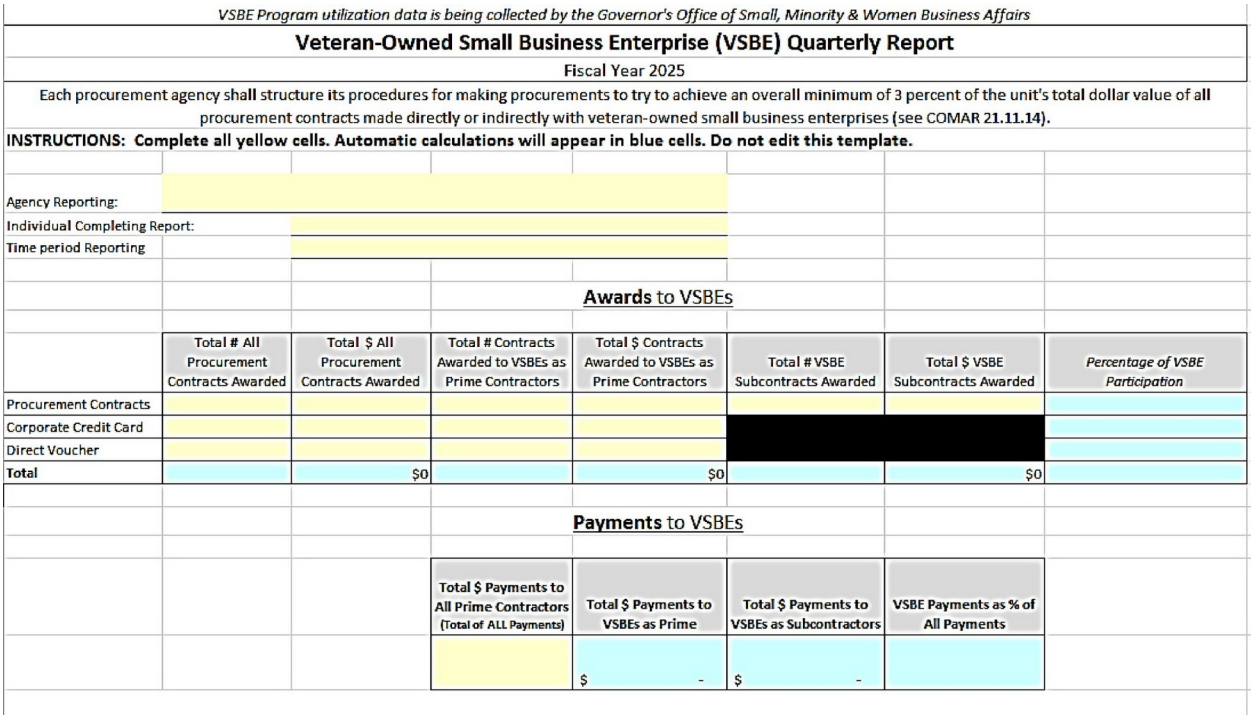
Tuesday, October 1st, Close of Business

FY2025 Reporting Requirements

NEW

- Quarterly VSBE Award and VSBE Payment Report
- Compliance Procurement Activity Report

VSBE Quarterly Report



VSBE Program utilization data is being collected by the Governor's Office of Small, Minority & Women Business Affairs

Veteran-Owned Small Business Enterprise (VSBE) Quarterly Report

Fiscal Year 2025

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 (see COMAR 21.11.14).

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

Agency Reporting:

Individual Completing Report:

Time period Reporting

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	*Percentage of VSBE Participation*
Procurement Contracts							
Corporate Credit Card							
Direct Voucher							
Total		$0		$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
	$ -	$ -	

VSBE Quarterly Procurement Activity Report

Quarter reporting for	Due date
Quarter 1 (July 1, 2024-September 31, 2024)	Wednesday, October 30, 2024
Quarter 2 (July 1, 2024- December 31, 2024)	Thursday, January 30, 2025
Quarter 3 (July 1, 2024- March 31, 2025)	Wednesday, April 30, 2025
Quarter 4 (July 1 2024-June 30, 2025)	Wednesday, October 15, 2025

FY25 Quarterly VSBE Procurement Activity Report Instructions

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.

Submission deadlines:

Reports are required to be submitted via email to: **vsbereports.gosba@maryland.gov**

QTR Reporting For:	Due Date:
Quarter 1 (July 1, 2024-September 31, 2024)	Wednesday, October 30, 2024
Quarter 2 (July 1, 2024- December 31, 2024)	Thursday, January 30, 2025
Quarter 3 (July 1, 2024- March 31, 2025)	Wednesday, April 30, 2025
Quarter 4 (July 1 2024-June 30, 2025)	Wednesday, October 15, 2025

Requirements for submission:

The Procurement Activity Report is collected quarterly and is cumulative. Your unit will retain and utilize the same template that is submitted for QTR 1 for the remaining submissions for FY25. This is to ensure that the data is being collected cumulatively.

Template requirements:

Complete all fields of each tab (Contract Awards, Contract Modifications, and Contract Renewals) in the Excel spreadsheet.
Enter your agency name in the Contract Awards tab in Column C3.
Do not modify any of the existing fields. If your unit does not have data for an entire tab, type "NONE" in the Identification Number field on the first row (Row 6).
Only include reportable data consistent with how procurement data is reported for the quarterly and annual VSBE reports.
The Summary tab auto-populates the data that was entered. This tab does not require any data input from the agency.

You may add rows if needed to supply all relevant data:

1. Click the row number to the far left (this will highlight the entire row)
2. Click on the Home tab at the top of the page. Navigate to the Cells group in the ribbon, then click the insert icon to add as many rows as you like



Instructions | Contract Awards | Contract Modifications | Contract Renewals | Summary

VSBE Quarterly Procurement Activity Report - Contract Awards Tab

VSBE Program Procurement Activity Report

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

Agency Name:

Contract Awards Issued	Identification Number	Value ($)	VSBE Goal (%)	VSBE Prime Contractor (Select from Dropdown)

SELECT IF VSBE PRIME CONTRACTOR
ONLY SELECT IF THE PRIME CONTRACTOR IS A CERTIFIED VSBE

VSBE Quarterly Procurement Activity Report - Contract Modifications Tab

VSBE Program Procurement Activity Report

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

Agency Name:

Contract Modifications Issued	Identification Number	Value ($)	VSBE Goal (%)	VSBE Goal Met at Time of Modification	VSBE Goal Not Met at Time of Modification	VSBE Prime Contractor (Select from Dropdown)

SELECT YES ONLY IF GOAL MET

VSBE Quarterly Procurement Activity Report - Contract Renewals Tab

VSBE Program Procurement Activity Report

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

Agency Name:

Contract Renewal Options Exercised	Identification Number	Value ($)	VSBE Goal (%)	VSBE Goal Met at Time of Renewal	VSBE Goal Not Met at Time of Renewal	VSBE Prime Contractor (Select from Dropdown)

VSBE Quarterly Procurement Activity Report - Summary Tab

VSBE Program Procurement Activity Report

The Wes Moore Administration has requested MBE Procurement Activity Reports on a quarterly basis.
Pursuant to COMAR 21.11.03.17 (F.) F. Each procurement agency shall furnish any other information or periodic reports requested by the Governor's Office of Small, Minority & Women Business Affairs or the Department of Transportation in connection with MBE certification and procurement, or any other matters related to the administration, effectiveness, or continuation of the Minority Business Enterprise 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 (#)	Total Cumulative Value ($)	(#) VSBE Goal Met at Time of Action (Modification or	(#) VSBE Goal Not Met at Time of Action (Modification or	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	

Next Steps

In FY2025:

- Change the definition of veteran for this program
- Regulation- Update Compliance language and strengthen more VSBE regulations
- More VSBE industry focused training
- Recorded training video series
- Updated VSBE Forms
- More targeted outreach
- Strategic Plan unit meetings
- Increase VSBE vendor confidence to prepare and bid on solicitations

Future VSBE Requests

- Extend VSBE certifications to 3 years
- Strengthen more VSBE Regulations

Thank You Very Much!

Danielle Davis

Danielle.Davis2@maryland.gov